

Healthy, Wealthy, and Wise



A REGISTERED INVESTMENT ADVISER

How to Get the Most Out of Your Financial Life Plans

Please take a minute to review the topics and related questions below.
Check off any concerns you have right now.

Chances are I have information that will help us address many of the issues that may concern you and your family.

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RETIREMENT

- ☐ Will my money last through retirement?
- ☐ What are my retirement investment options?
- ☐ How do I manage all my retirement plans?
- ☐ What should I do with my employer retirement plan?
- ☐ Do I need long-term care insurance?
- ☐ Since I am retiring soon, what do I need to do now?

SANDWICH GENERATION

- ☐ When and how should I start my Social Security benefits?
- ☐ What should I know about Medicare?
- ☐ What happens if I have to care for my parents?
- ☐ What should I share with my family about my Estate Plan?

EDUCATION

- ☐ How do I teach my kids about money?
- ☐ What are my college savings options?
- ☐ How do I help a young adult establish a financial strategy?

LIFE EVENTS

- ☐ How do we manage our finances after getting married?
- ☐ What happens to my 401(k) when I change jobs?
- ☐ I am getting divorced. What happens to my assets?
- ☐ How do I prepare my business for the future? Grow it? Sell it? Leave it to my family?
- ☐ What do I do when a loved one dies?

ESTATE PLANNING

- ☐ What should I know about estate planning?
- ☐ How do I protect my estate from taxes?
- ☐ Will my family be secure if something happens to me?
- ☐ How do I create a legacy for my children?
- ☐ Can I provide for my favorite charity when I am gone?

FINANCIAL BASICS

- ☐ What will my survivors need to know?
- ☐ How do I keep my records safe and organized?
- ☐ How do I do a better job budgeting? How do I reduce my debt?
- ☐ How do I create a disaster plan for emergencies?

REQUEST INFORMATION

NAME

ADDRESS

CITY

STATE

ZIP CODE

BUSINESS PHONE

HOME PHONE

E-MAIL

☐ I would like to introduce you to someone I know who may benefit from your services.

The finest compliment anyone can give us is an introduction to their family, friends, and business associates.

We would appreciate you sharing this Healthy, Wealthy, and Wise financial review with them.

Eagle Strategies, LLC. does not provide legal, tax or accounting advice. Clients of Eagle Strategies should obtain their own independent tax and legal advice based on their particular circumstances.