

Empowering Your Financial Journey: A Checklist for Women

As a woman, financial considerations can be numerous. Review the list below and mark any current concerns you may have. Seeking assistance from an investment professional can address the distinctive financial challenges that women encounter and help alleviate the worries that may be on your mind. Asking the right questions is the initial stride towards discovering effective solutions.



RETIREMENT

- Will my money last through retirement?
- What if I need long-term care?
- How do I manage my various retirement plans?
- What should I consider before claiming Social Security?
- What steps should I take before I retire?

NAME

ADDRESS

CITY

STATE

ZIP CODE

HOME PHONE

CELL PHONE

EMAIL

BEST TIME TO CALL



EDUCATION PLANNING

- What are my education savings options?
- When should I start saving?
- How do I identify schools best suited for the student in our family?
- Where can I find resources to supplement our education savings?



LIFE EVENTS

- How do we manage our finances after getting married?
- What happens to my 401(k) when I change jobs?
- What are my options if I am laid off?
- What would happen to my assets if I got divorced?
- How do I help a recent graduate transition into the workforce?
- What do I do when a loved one dies?



ELDERCARE

- What is Medicare? What resources are available to help me understand it?
- What should I consider when evaluating care facilities?
- How do my family and I cope with a debilitating disease?
- What happens if I have to care for my parents?



ESTATE PLANNING

- What is estate planning, and how do I protect my estate?
- Who will make important decisions for me if I am incapacitated?
- Will my family be secure if something happens to me?
- How do I create a legacy for my family or favorite charity?
- What will my survivors need to know?



FINANCIAL BASICS

- 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 teach children and young adults about money and financial planning?
- How do I have financial discussions with family?
- Am I properly insured to protect my family, my income, and my assets?
- Am I invested properly to pursue my goals? Are my investment strategies cost-effective and tax-efficient?



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