NAME:__________________________________

Please Check The Boxes That Concern You:

RETIREMENT

- [ ] Financial issues as retirement draws near
- [ ] Do I have enough to retire?
- [ ] How long will my money last?
- [ ] Should I roll over my 401(k)?
- [ ] Which is best? Ordinary or Roth?
- [ ] Should I consolidate my retirement plans?
- [ ] What are my 401(k) distribution options
- [ ] Required Minimum Distributions (RMDs)
- [ ] Which asset to spend 1st, keep to last?

ESTATE PLANNING

- [ ] Are my beneficiary designations correct?
- [ ] Should I stretch my IRA?
- [ ] Have I told my survivors my wishes?
- [ ] Do I know what I need to know about estate and inheritance taxes?
- [ ] Is my current plan maximizing my tax deductions to my heirs?
- [ ] Should I set up a trust?
- [ ] What should I do with my home at my death?
- [ ] What is IRD?
- [ ] Am I effectively managing my estate?
- [ ] How can I give my money away, have enough retirement income, and still pass my assets to my children/grandchildren?
- [ ] How do I spend the assets I have left efficiently?

ELDERCARE

- [ ] Caring for my aging parents
- [ ] How will I be able to help a loved one with Alzheimer’s disease?
- [ ] Being a caregiver
- [ ] Finding the right care facility for an older relative
- [ ] Choosing long-term care insurance
- [ ] When do I consider a nursing home?
- [ ] Making sense of Medicare.
- [ ] Power of attorney issues
- [ ] Executor and Executrix responsibilities

EDUCATION PLANNING

- [ ] What will it cost me to get ready?
- [ ] Understanding college savings options
- [ ] 529 college planning
- [ ] Do I qualify for financial aid for my kids?
- [ ] What is FAFSA?
- [ ] State or Private schools?
- [ ] Is there a way to shelter assets?

LIFE EVENTS/FAMILY SECURITY

- [ ] Upcoming wedding expenses
- [ ] What to do when a relative dies
- [ ] New job/career - benefits review
- [ ] 401(k) plan choices for job changes
- [ ] Life Insurance - How much is enough?
- [ ] Divorce/Spouse death: Now you’re “on your own”
- [ ] Grandchildren have arrived! I want to enhance their financial future
- [ ] Disability: Who will pay my monthly bills when I can’t work?

FINANCIAL BASICS

- [ ] Organizing my financial records
- [ ] Create a household budget
- [ ] Reducing debt
- [ ] Creating a simplified “big picture” plan
- [ ] Keeping track of our financial assets, liabilities and cash flow

Everett Wealth Solutions, Inc . is a Registered Investment Advisor
and Fiduciary Financial Planning Firm. Member FINRA.
407 Marengo Avenue - Forest Park - IL 60130
www.EverettWealthSolutions.com