

2024 Financial Spring Cleaning

Simplify the Complex

Focus on Financial Clarity

Build Your Legacy

Consider these Retirement Questions

- Non-Qualified Accounts
 - Checking, savings, investments
 - Qualified Accounts
 - Retirement plans

 - Understand what you own
 - Investments aligned with your goals
 - Risk tolerance
 - Ditch duplicates
 - Check and confirm beneficiaries

 - Family
 - Charitable

 - Do we talk enough about money?
 - Are both partners on the same page about investment risk?
 - Is there a backup plan if the financial steward dies first or develops dementia?
 - Are good financial records being kept?
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