

Wealth Planning Check-In for Emerging Professionals & Growing Families

Setting Direction

My current priorities include:

- Building emergency savings
- Managing or reducing debt
- Saving for a home or major purchase
- Advancing my career or income
- Balancing today's lifestyle with future goals

Long-term goals I'm thinking about:

- Retirement savings
- Financial independence

- Education planning
 - Flexibility for life changes
 - Supporting family over time
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Saving & Investing Foundations

- I am contributing to retirement accounts
- I understand how much I should be saving
- My investments align with my goals and time horizon

Accounts I currently use:

- Workplace retirement plan
 - IRA / Roth IRA
 - Brokerage or savings accounts

 - I would benefit from a clearer investment strategy and structure
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Market Understanding & Comfort Level

- I understand basic market concepts
- I feel comfortable with my current risk level
- I know how my investments may behave in different markets

Topics I want to better understand:

- Investing basics
 - Market downturns and long-term planning
 - Tax-efficient saving and investing
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Family & Future Planning (if applicable)

- Planning for children or education is important to me
 - I understand available education savings options
 - I want my wealth plan to adapt as my life changes
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What I Value in an Advisor

- Clear, honest communication
- Guidance aligned with my values

- Education and long-term perspective
- A relationship that evolves over time

Confidence in my financial direction (1–10, 10 being the most confident): ____

Reflection

- This review helped clarify my priorities
- I know others who may be navigating similar questions

Being informed and proactive can make a meaningful difference over time.

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