



Financial planning for young professionals

Now is a great time to start working towards your financial goals. I'm here to help, and can help the best if I know what's most important to you. Help me understand your priorities and the things you want to learn more about. Together, we can build a plan to help get you where you want to go.



Life's brighter under the sun



What's important to you?



Financial basics

- How do I create a strategy for my specific goals and circumstances?
- How do I create and maintain a budget?
- How do I reduce my debt?
- Which debts should I pay off first?
- What do I need to know about setting up an emergency fund?



Life planning

- How do I maintain my standard of living over time?
- How do I save for major purchases like a trip, car or house?
- How do I save to start my own business?
- What happens if I lose my job or can't work?
- What are my options if I want to go back to school?
- How do I manage my finances with my partner after getting married?
- What happens if I get divorced?
- How do I support my parents as they age?
- How do I prepare for an inheritance?



Insurance and protection

- How much insurance do I need?
- Is my insurance coverage enough?
- How do I help protect myself and family if I get sick or injured?



Investments

- How do I invest?
- How much should I invest?
- What is a good investment strategy?
- How do I maximize my workplace savings plan?
- Am I growing my assets in a tax-efficient way?



Family planning

How do I plan for a lower income during paternity leave?

How do I plan for childcare payments?

Do my children need insurance?

How do I save for my child's education?



Retirement

How much money do I need to retire?

What is the best way to save for retirement?

Am I on track to meet my retirement goals?

How early can I retire?



Estate planning

Do I need a will or a trust? Or both?

What estate documents do I need?

How do I create a legacy for my children?



What else is on your mind?



Identify your priorities

Now that you've identified what's important to you, tell me your top three priorities. Is there something you're worried about? Or a topic you want to learn more about? Let me know so we can start our plan with what matters most to you.

1. _____

2. _____

3. _____

