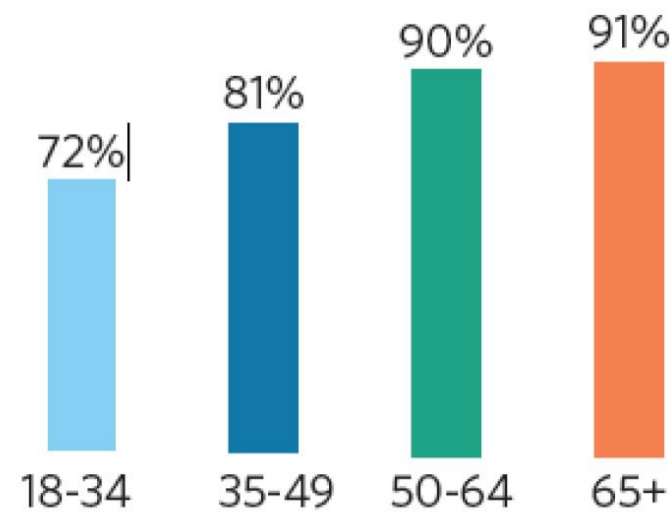




Being healthy is about being able to do the things you want



Base: U.S. adults by age

Source: The Four Pillars of the New Retirement, Edward Jones & Age Wave, 2020

March 2, 2021

If you only talk about money with your financial advisor, you are missing out. That chart above is an interesting peek into mindsets about health and retirement. Recent studies show you have a lot more that you'd like to discuss:

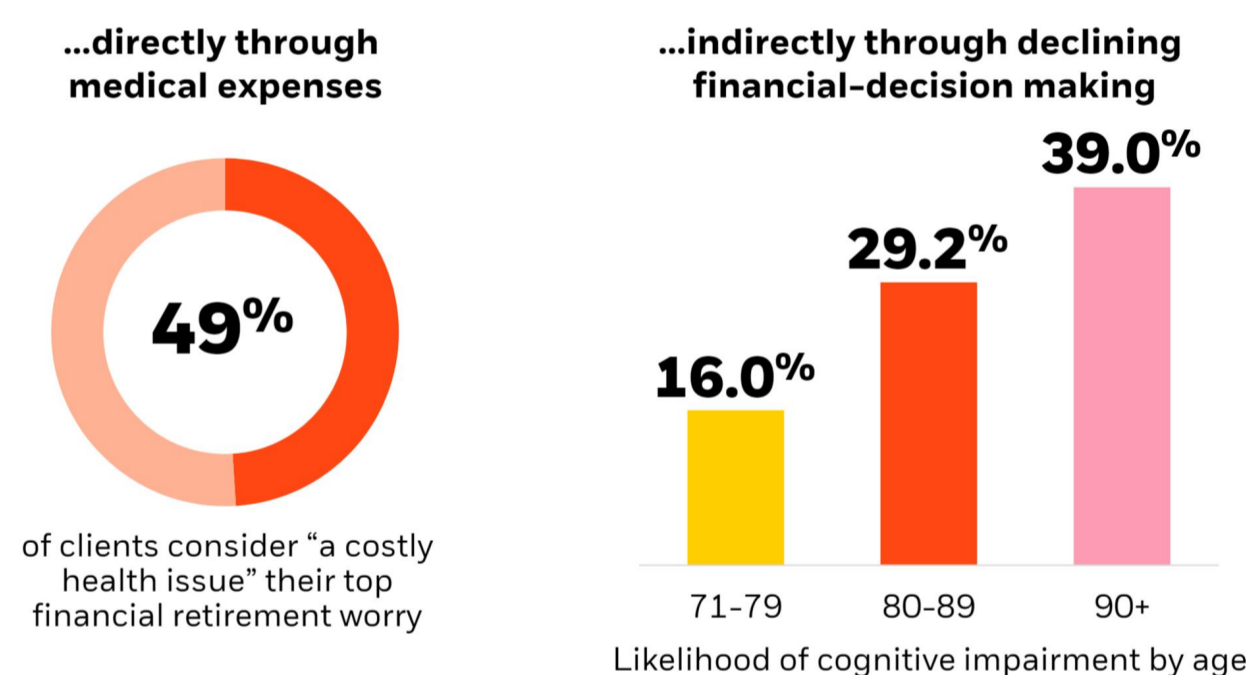
- 85% of highly satisfied clients have discussed future goals and aspirations
- 77% have discussed job transitions, new careers, or retirement
- 72% have discussed potential expenses for their own care
- 62% have discussed their family members' finances

You should be talking about whatever matters to you. What keeps you up at night? What have you been procrastinating? What are you excited about and looking forward to? A great advisory team also has a great network of resources.

We've helped people find amazing vacation adventures, plan their new businesses or hobbies in retirement, and connected people to a doctor that changed their life. Tap our network and resources!

One key topic beyond money is HEALTH. I believe your health (physical/mental/emotional) greatly impacts your wealth and needs to be included in your goals for your life.

Your clients' health can impact their wealth...



Sources: Merrill Lynch/Bank of America, "Finances in Retirement: New Challenges, New Solutions", 2017; Annals of Internal Medicine, "Prevalence of Cognitive Impairment without Dementia in the United States", 2008.

Accumulating wealth while neglecting your health is a recipe for failure.

Click the blue button below and let's talk about all of the personal life goals and concerns on your mind and see how we can help you succeed.

P.S. If you enjoy podcasts, here is a link to 31+ podcast interviews I've done recently. I suggest you listen on 1.25x or 1.5x speed.

P.P.S. My book "Stress Free Money" got named by Forbes (business, finance, goals category) as #14 for "Top 21 Books to Read in 2021."

Sincerely,

Chad W. Willardson
WEALTH ADVISOR FOR ENTREPRENEURS

Certified Financial Fiduciary®

Click HERE to read our google reviews.

Schedule a Call

