



January 18, 2019

Statistically speaking, you will give up on your New Year's goals this weekend (assuming you made any). To me, that's somewhat pathetic. Three weeks into the year, and people are completely giving up? With 49 weeks to go?

Most of the goals you set have to do with: health, money, and relationships.

If one of your goals for 2019 has to do with improving your finances towards a bigger and better personal future, there's no reason to hesitate. It's easy to procrastinate digging into your financial life, but the longer you wait, the more opportunities you miss out on. Time waits for no one.

Alan Lakein once said, "Planning is bringing the future into the present so that you can do something about it now."

Here are the areas we can help you with:

- Retirement income planning
- Managing investments for growth and/or income
- Borrowing or paying down debt efficiently
- Analyzing investment real estate
- Funding college tax-efficiently
- Collaborating with your CPA to reduce taxes
- Optimize insurance policies
- Plan your Medicare and Social Security
- Review your legacy and estate planning
- Set a strategy for cash flow management

If you have questions about any of these topics on the list, schedule a brief Goals Conversation® with our team by visiting our [website](#) today - no cost or obligation involved. You may also click [HERE](#) for our google reviews.

