



May 5, 2020

I remember back in 2005 a couple I met was preparing for a month-long European vacation to celebrate their recent retirement. They'd planned and anticipated this trip for many years, and mapped out all the different places to visit. As the big date approached, they got a sinking feeling inside, "What if something happened to us? Our kids would have no idea where to start or whom to call with all of our financial stuff."

They had 14 financial accounts at multiple banks and investment firms and four insurance policies at different companies. Preparing for the trip made them realize they'd leave behind a big mess if anything happened to them. They suddenly felt great urgency to get their financial life in better order. Often, this happens when you have a life change, for example: a job change, selling a business, family member passes away, a divorce, retirement, moving a parent into assisted living, etc.

If something unexpected happened to your parents, would you know where everything is? What about your own kids or other family members? We have a few tools and strategies to help you get your financial life organized that give you a clear plan for emergencies that you can share with your family. Many people are using these "shelter at home" times to do some serious spring cleaning and organizing. If you'd like some ideas on how to apply that to your financial life and your documents/records, let us know. We can help.

Sincerely,

  
WEALTH ADVISOR FOR ENTREPRENEURS

Click [HERE](#) for our google reviews.

[Schedule a Call](#)

