



November 1, 2018

Common top priorities we hear:

- *Steady income in retirement
- *Protect family assets in case of emergency
- *Reduce taxes
- *Grow investments
- *Pay off debt
- *Comfortable lifestyle without work
- *Pay for kids/grandkids' college
- *Travel to new places
- *Invest in real estate
- *Sell business
- *Create a family legacy

The underlying desire is to live a meaningful life with without stressing about money anymore. As you think about your own situation, see if you can answer these 6 questions:

1. What is preventing you from begin stress free and financially secure?
2. Are you working because you want to or because you have bills to pay that aren't yet covered by investment income?
3. How much of your income is taxable versus tax-free?
4. If you reach your goals in 2019, how much money would you be able to save and invest?
5. Did you make any adjustments in your finances to take advantage of the "Tax Cuts and Jobs Act" passed last December?
6. If you own a business, what is your succession or exit plan? Do you have a self-managing company that doesn't require you to be involved in day to day operations?

These are good "thought starters" for you. We can help you take important steps towards protecting and growing your wealth. The end result is more financial freedom and less stress in your life.

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.

