

What Keeps You Up at Night?

Please take a minute to review the topics and related questions below. Check off any concerns you may have right now. Chances are I have information that will help us address many of the issues that may worry you.

RETIREMENT	Will my money last through retirement? Do I need long-term care insurance?	REQUEST INFORMATION
	What are my retirement investment options?	
	How do I manage all my retirement plans?	Click Hara to
	What should I consider before claiming social security?	Click Here to
	What should I do with my employer retirement plan?	Learn More
	Since I am retiring soon, what do I need to do now?	Learn Wore
EDUCATIONAL PLANNING	How much should I save for college? When should I	
	start planning?	Click Here to Schedule
	Will I qualify for financial aid? Where do I start?	
	What are my college savings options?	Appointment Now
LIFE EVENTS	How do we manage our finances after getting married?	
	What happens to my 401(k) when I change jobs? What are my options if I am laid off?	
	I am getting divorced. What happens to my assets?	
	How do I help my recent college grad transition into	
	the workforce?	
	What do I do when a loved one dies?	
ELDERCARE	How does Medicare work?	
	What should I look for in a nursing home?	
	How do I cope with Alzheimer's disease?	
	What happens if I have to care for my parents?	
ESTATE PLANNING	What should I know about estate planning?	
	How do I protect my estate from taxes?	
	Will my family be secure if something happens to me?	
	How do I create a legacy for my children?	
	Can I provide for my favorite charity when I am gone?	
	What will my survivors need to know?	
FINANCIAL BASICS	How do I keep my records safe and organized?	
	How do I do a better job budgeting? How do I reduce	
	my debt?	
	How do I teach little kids about money?	Todd Hoffman, CFP®, CPM®
	How do I help a young adult establish a financial	600 Cleveland St., Suite 1150
	strategy?	Clearwater, FL 33755 727. 351. 5323
	How do I have financial discussion with family?	,2,,331,3323

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