

Wealth Management Strategy

By Anne Tahim, CPA

Wherever you are in life – fresh from college, in the prime of your career, or in retirement- you have dreams for the future. To help you turn those dreams into reality, we can help you find clear solutions to complex financial issues. Because we know you need answers, not more questions in life. Get started on your path to financial success.

Financial essentials to consider for each decade of your life:

~20s~

- ❖ Create Budget
- ❖ Pay off Consumer Debt
- ❖ Start a Savings Program
- ❖ Determine Personal Insurance needs
- ❖ Protect belongings with insurance
- ❖ Create a Living Trust

~30s~

- ❖ Save for Retirement
- ❖ Pay off Consumer Debt
- ❖ Consider Mutual Funds
- ❖ Analyze benefits from your employer
- ❖ Write a Simple Will and a Living Trust
- ❖ Review insurance needs
- ❖ Begin an education savings plan
- ❖ Anticipate housing needs
- ❖ Name a guardian for your children

~40s~

- ❖ Diversify Investments
- ❖ Develop an Estate Plan
- ❖ Review your Will
- ❖ Re-evaluate insurance needs
- ❖ Analyze employer benefits
- ❖ Review business agreements and transfer plans
- ❖ Continue to build Education funds
- ❖ Investigate a trust

~50s~

- ❖ Evaluate and update Retirement Plans
- ❖ Diversify your Investments
- ❖ Think about long term health care
- ❖ Review business agreements and transfer plans
- ❖ Review Estate Plan
- ❖ Review and revise Will and Living Trust
- ❖ Analyze Employer benefits
- ❖ Re-evaluate Insurance needs
- ❖ Consider Annuities

~60s~

- ❖ Re-evaluate budget and Cash Flow
- ❖ Review your Will and Living Trust
- ❖ Review Estate plan
- ❖ Consider income-producing investments
- ❖ Look into part-time employment
- ❖ Make sure long term care needs are met
- ❖ Supplement Medicare
- ❖ Review business agreements and transfer plans
- ❖ Consider Annuities

~70s~

- ❖ Review your Will and Living Trust
- ❖ Review Estate Plan
- ❖ Re-evaluate budget and cash flow
- ❖ Make sure long term care needs are met
- ❖ Supplement Medicare
- ❖ Review business agreements and transfer plans



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