



Paul M. Goyette, CFP®, AIF®, CEP®, CFS®, ChSNC®  
Michelle L. Wheeler, ChFC®, ChSNC®

*Events That Might Prompt You to Seek a Financial Planner:*

- *Saving enough for retirement*
- *Rolling over a pension or IRA*
- *Help allocating company 401(k)*
- *Handling the inheritance of a large sum of money or other unexpected financial windfall*
- *Preparing for marriage or divorce*
- *Planning for the birth or adoption of a child*
- *Facing a financial crisis such as a serious illness, layoff or natural disaster*
- *Caring for aging parents or a disabled child*
- *Retirement income distribution strategies that seek to help your money last as long as you do*
- *Coping financially with the death of a spouse or close family member*
- *Funding education*
- *Buying, selling and passing on a family business*
- *Tax planning*
- *Estate planning*

43 Constitution Drive • Bedford, NH 03110  
(603) 471-0900 • Paul - Ext. 202 • Michelle - Ext. 203  
pgoyette@northeastplanning.com • mwheeler@northeastplanning.com  
*For more information on the practice, please visit [www.financialplanningmatters.com](http://www.financialplanningmatters.com).*