



Life Event Case Study:  
**Changing Jobs**

**Life Formation Stage: Accumulation**

**Life Event**

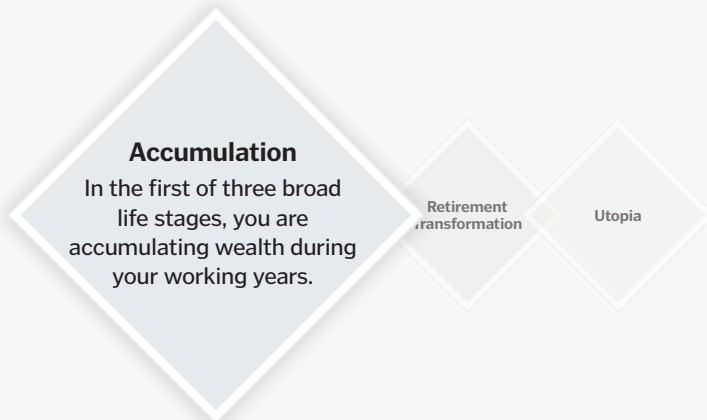
Our client was a senior manager at a large company when she decided to accept a corporate position at another organization. The new job came with equity compensation, bonuses and other features that allowed her to re-evaluate her goals and her financial strategies.

Once she was settled at her new workplace, we began guiding her through the *FORM for Life™* process.

**Impact**

We recalibrated her entire financial picture and found that with her new compensation structure she didn't have to put as much away for retirement as she did previously. We also found that the insurance component of her executive benefits resulted in her being over-insured, so we were able to reduce her insurance premiums.

All of this together meant that she could pursue more lifestyle goals in the short term, including vacations and charitable giving, while staying on track to retirement.



**Life Services**

- ◆ Goal setting strategies
- ◆ Goals, time horizon & risk analysis
- ◆ Investment Policy Statement
- ◆ Employee stock planning
- ◆ Concentrated position planning
- ◆ Budgeting tools
- ◆ Saving strategies
- ◆ Emergency fund monitoring
- ◆ Employee benefit guidance
- ◆ CPA collaboration
- ◆ Deferral strategies
- ◆ 401(k) strategies
- ◆ Will review