What Keeps You Up at Night?

POLARIS ADVISORS
Your Guide to a Brighter Tomorrow™

Please take a minute to review the topics and related questions below. Check off any concerns you 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?
- ☐ How do I manage all my retirement plans?
- ☐ What should I consider before claiming Social Security?
- ☐ What should I do with my employer retirement plan?
- ☐ Since I am retiring soon, what do I need to do now?

Education Planning

- ☐ How much should I save for college? When should I start planning?
- ☐ What are my education savings options?

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 can I learn more about Medicare?
- ☐ What should I consider when evaluating care facilities?
- ☐ How do I cope with Alzheimer's disease?
- ☐ What happens if I have to care for my parents?

Estate Planning

- ☐ What is estate planning?
- ☐ How do I protect my estate?
- ☐ 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?
- ☐ How do I help a young adult establish a financial strategy?
- ☐ How do I have financial discussions with family?

NAME

ADDRESS

CITY

STATE

ZIP CODE

BUSINESS PHONE

HOME PHONE

EMAIL

BEST TIME TO CALL

This material should be used as helpful hints only. Each person's situation is different. You should consult your investment professional or other relevant professional before making any decisions.

Submit to: retirementplans@polarisadvisors.net
prior to meeting with a Financial Coach.