

Let's Talk

My goal is to help you achieve your goals; but in order to do that, I have to know what some of your dreams and goals are. Is it okay if I ask you a few questions?

- 1) Tell me about your family.
- 2) Tell me about your work.
- 3) What did your parents do? Are they still alive today? What challenges do they have?
- 4) If we are sitting here on the day you turn 65, what does your upcoming retirement look like?
- 5) What have you done up to this point to prepare for that?
 - a) Are you saving money for an emergency fund? How much?
 - b) Are you contributing to a retirement plan? How much?
- 6) Do you have a written plan to achieve that goal?
- 7) What goals do you have between now and then? Kid's college? Paying off your home? Other goals?
 - a) Are you saving for that? How much?
 - b) Other savings goals? How much?
- 8) What risks to reaching your goals do you see?
- 9) What fears do you have about your goals?