



# YOUR REAL PLAN

INVEST	RETIRE	ESTATE	FAMILY	TAXES	INSURANCE	BUSINESS
Figure out which investments to use	Decide what retirement looks like for me	Determine if my will does what I want it to do	Giving away while I am alive	How I deal with capital gains tax	Determine if I have the right insurance policies	Strategy to exit my business when I am ready
Develop a strategy over meaningful periods of time	Assess how much I can spend and when I can spend it	Figure out if I need a trust	Paying for college	How I deal with tax on dividends and interest	Decide how much insurance my family needs	Connect with a trusted business attorney
Put money to work in the right place	Identify where my income will come from	Best way to name beneficiaries	Helping my mom and dad	How and when I pay taxes	Will my insurance help me pass assets to the people I love	Keep my business in the family if I want to
Decide how much risk to take	Figure out how much I need to save	Team with a trusted attorney specialist	Helping my kids	Team with a trusted CPA or tax advisor	How I should pay for insurance	Access capital to grow my business
Rebalance my investments when I need to	Determine effects divorce or separation on my retirement plans	What to do if I get sick			Team with a trusted insurance specialist	Determine whether my operating agreement still fits
Personal banking						

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