S.J. Boyle Wealth Planning

High Net Worthy

20 Questions
To Attaining A Crazy Good Retirement

Developing a wealth plan requires understanding where you want to go, how you want to get there, and what's important to you. It also requires putting various ducks in a row. The following 20 questions do not represent an exhaustive list. They do represent a good beginning. Answering them gives you a place to begin doing the important work of wealth planning.

1. **Do you have a financial plan?**

2. **When would you like to retire?**

3. **How do you currently manage your money? Retirement Plans? Financial Advisor?**

4. **What activities are most important to you in retirement? Traveling? Time with friends and family? Working for fun? Volunteering?**

5. **What word most accurately describes your vision of retirement? Freedom? Leisure? Boredom? Something else?**

6. **Where do you expect the majority of your retirement income to come from? Savings? Government? Pension?**

7. **How would you characterize your overall health?**

8. **On a scale of 1-10, with 10 being very much and 1 being not at all, how comfortable are you with investing?**

9. **Are you married?**

10. **Do you own your home?**

11. **How many children under 18 do you currently have?**

12. **Do you own a business?**

13. **Do you have a 401K and/or an IRA?**

14. **Do you have an emergency fund?**

15. **Which of these is most important to you in your financial advisor: Tax expertise; Estate planning expertise; Investment expertise.**

16. **On a 10 scale, with 10 being very and 1 being not at all, how important is socially responsible investing to you?**

17. Do you currently have a financial advisor?

18. Does it matter to you where your financial advisor lives?

19. Have you recently reviewed your estate plan?

20. Which is your priority right now: comprehensive financial plan, or improving your investment returns?

Congratulations on coming this far. It's far more than most people ever do. You've begun answering some of the simple yet important questions. What's next?

The smart thing is to continue working on it all. And if you'd like a consultation on next steps, I'm happy to do that with you. I offer a free, 30-minute consultation on your wealth planning journey.

If you'd like to have a chat, you can book a time on my calendar, or call the number below.

Would you like to have a conversation about your wealth plan?
To schedule a free 30-minute consultation, just call **603-277-9953**

Or, schedule a consultation on my calendar by clicking here.