## Top Resources To Use Based On Client Age

### 20s - 30s
- What Issues Should I Consider When Starting A New Job?
- What Issues Should I Consider When Getting Married?
- What Issues Should I Consider If I Get A Promotion Or Raise At Work?
- What Issues Should I Consider If I Lose My Job?
- What Issues Should I Consider When Having (Or Adopting) A Child?
- What Issues Should I Consider To Fund My Child's College Education?
- What Issues Should I Consider When Buying a Home?
- What Issues Should I Consider When Paying Off My Student Loans?
- Should I Consider Refinancing My Mortgage?
- Should I Contribute To My Roth IRA Vs My Traditional IRA?
- Should I Roll Over My Dormant 401(k)?
- Pay Stub Review

### 40s - 50s
- What Issues Should I Consider If I Lose My Job?
- What Accounts Should I Consider If I Want To Save More?
- Can I Make a Backdoor Roth IRA Contribution?
- Can I Make A Deductible IRA Contribution?
- Is The Distribution From My 529 Plan Taxable?
- What Issues Should I Consider For My Aging Parents?
- Should I Consider Doing a Roth Conversion?
- Should I Consider Refinancing My Mortgage?
- Should I Contribute To My Roth IRA Vs My Traditional IRA?
- Should I Roll Over My Dormant 401(k)?
- What Issues Should I Consider Regarding My Incentive Stock Options?
# Top Resources To Use Based On Client Age

## 60s
- What Issues Should I Consider Before I Retire?
- Should I Roll Over My Dormant 401(k)?
- Should I Take My Pension As A Lump Sum?
- Will My Social Security Benefit Be Reduced?
- Am I Eligible for Social Security Benefits If I’m Divorced?
- As A Retiree, What Issues Should I Consider When Reviewing My Tax Return?
- What Issues Should I Consider When Establishing My Charitable Giving Strategy?
- Can I Make a Backdoor Roth IRA Contribution?
- Can I Make A Deductible IRA Contribution?
- Should I Consider Doing a Roth Conversion?
- What Issues Should I Consider If My Parent Passed Away?
- Will I Avoid IRMAA Surcharges On Medicare Part B & Part D?
- What Issues Should I Consider If I Experience A Sudden Wealth Event?
- Will Healthcare Change As I Transition Into Retirement?

## 70s
- What Issues Should I Consider If My Spouse Has Been Diagnosed With A Terminal Illness?
- What Issues Should I Consider If My Spouse Passed Away?
- What Issues Should I Consider Before I Update My Estate Plan?
- As A Retiree, What Issues Should I Consider When Reviewing My Tax Return?
- Am I Eligible for Social Security Benefits as a Surviving Spouse?
- What Issues Should I Consider When Establishing My Charitable Giving Strategy?
- Can I Do a Qualified Charitable Distribution From My IRA?
- Should I Consider Refinancing My Mortgage?
- Should I Change My Medicare Coverage During Open Enrollment?