



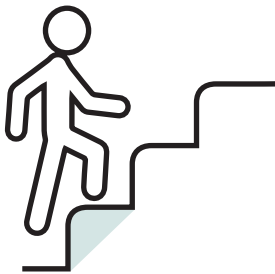
Top Resources To Use Based On Client Age

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?
- ▶ As Someone Who Is Working, What Issues Should I Consider When Reviewing My Tax Return?
- ▶ 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

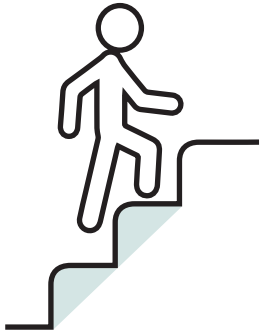


- ▶ As Someone Who Is Working, What Issues Should I Consider When Reviewing My Tax Return?
- ▶ What Issues Should I Consider If I Lose My Job?
- ▶ What Accounts Should I Consider If I Want To Save More?
- ▶ Can I Make a Backdoor Roth IRA Contribution?
- ▶ Can I Make A Deductible IRA Contribution?
- ▶ 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?



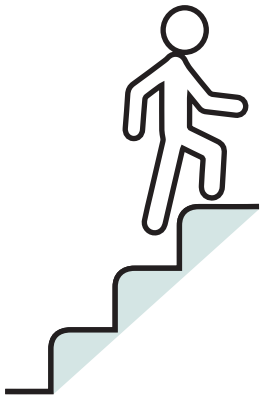
Top Resources To Use Based On Client Age

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?