

## FREQUENTLY ASKED QUESTIONS

- What does “fee only” mean?
- At what age can I afford to retire?
- What financial changes can I expect after I get married?
- How can my fiancé and I prepare for our wedding?
- How much can I contribute toward my kid’s education and still stay on track to reach my retirement goals?
- What is my net worth?
- How will having another child impact our family’s financial goals?
- How much can I afford to pay for a house?
- How much should I be saving each month to reach my short and long term financial goals?
- What is the best vehicle I can use to save for my future?
- What types of insurance do I need to safeguard my family?
- How much do I spend and what do I spend it on?
- What are some practical strategies to improve my cash flow?
- Is my portfolio diversified? What exactly does “diversification” mean?
- How do I evaluate my comfort level with the risks inherent in investment purchases?
- Are my investments allocated appropriately for my age and risk tolerance?
- Will you make specific “buy or sell” recommendations for my portfolio?
- What documents do I need in place to protect my family and me if I were to die or become incapacitated?
- What tax savings strategies are available to me?
- Am I taking advantage of all the benefit plans my employer offers?
- How will inflation impact my retirement goals?

(Source: NAPFA)