ANCHOR
WEALTH STRATEGIES

PLANNING CREATES FREEDOM.

10 questions for your financial future

A little reflection today can help bring clarity to your next steps.

1. **What do I want my money to make possible?**
   Identify the people, experiences, and goals that matter most—now and in the years ahead.

2. **Is my everyday money supporting those goals?**
   Review spending, savings, and debt to see whether my habits reflect my priorities.

3. **Am I prepared for the unexpected?**
   Consider whether my accessible savings could cover an emergency or interruption in income.

4. **Does my investment strategy still fit my life?**
   Review my mix of investments, costs, time horizon, and comfort with risk.

5. **Am I on track for the retirement I want?**
   Consider when I hope to retire, the lifestyle I envision, and what I need to save.

6. **Where will my retirement income come from?**
   Think through Social Security, pensions, savings, and how I will turn assets into income.

7. **Am I considering taxes in my financial decisions?**
   Review how saving, investing, and withdrawals may affect my taxes now and later.

8. **Have I planned for health care and protection?**
   Review insurance, future medical expenses, Medicare, and potential long-term care needs.

9. **Does my legacy plan reflect my wishes?**
   Review beneficiaries, my will or trust, and powers of attorney after important life changes.

10. **Do I have guidance as my life changes?**
    Consider whether I have a financial professional who listens, explains clearly, and helps me follow through.

Stay connected

Explore financial planning resources, sign up for our newsletter, and see upcoming events.

www.anchorwealthstrategies.com

Scan with your camera, or tap the code in this PDF.

For educational purposes only; not individualized investment, tax, or legal advice. Investing involves risk, including loss of principal. Consult the appropriate professionals about your circumstances.