



Health and Wealth

Keeping Pace

As you become more comfortable in your financial routine, you may have new responsibilities and obligations to consider. Have you become more established in your career? Have you started a new job? Have you recently come into an inheritance? Or do you have loved ones who now rely on you financially?

Enhance your regimen with the following:

Build a Team

It is important to gather a team of experts. Consider Financial Professionals, Attorneys, and Accountants as personal trainers who are there to help keep you on track with your financial goals.

Re-evaluate Your Savings and Emergency Fund

Without an emergency fund, unexpected costs can affect your financial wellbeing. As your income and financial obligations change, consider re-evaluating how much you are allocating towards your emergency fund/savings to cover any unexpected expenses.

Contribute to Employer Sponsored Savings Plans

Qualified retirement plans such as a 401(k) can be a very powerful savings tool. They provide employees with an automatic way to save for retirement and the possibility of employers matching contributions. If a 401(k) is not available to you, an Individual Retirement Account can offer similar benefits.

Protection Planning

Life insurance is an important purchase to consider. In addition to the death benefit it provides to your heirs, some policies offer a savings component that can be leveraged to cover future expenses such as college tuition, purchasing a new home or providing an additional income source in retirement.

Periodically reviewing your current and future obligations will help keep you on pace towards a healthy and secured financial future.



Please contact us with questions:

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