You Deserve Experienced Retirement Guidance

GARY ALPERT
FINANCIAL STRATEGIES

10 Questions You Should Ask Your Financial Advisor Right Now

Is the advisor you're working with right now helping you create a retirement roadmap complete with strategies on how you can work toward your specific goals?

If not, it's time to think differently.

How large of cash reserve do you recommend I carry?
Are there things we can do to streamline our budget?
When should my spouse and I claim Social Security?
Can changes be made that improve our tax scenario?
How do we go about constructing a plan for our estate?
What are the most feasible options for charitable giving?
What are we currently paying in annual fees with your firm?
What types of insurance are necessary to protect my family and me?
How can we protect ourselves and our aging parents in the event of a health emergency?
How can we structure our investments with the goal of our money lasting as long as we do?

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