



## Accredited Wealth Management

Steve Giacobbe, CFA, CFP®  
sgiacobbe@accreditedwm.com

Shawn Clark  
sclark@accreditedwm.com

6010 Brownsboro Park Blvd  
Louisville, KY 40241  
(502) 290-1905  
www.accreditedwm.com

These questions are helpful for us to understand what matters most to you and communicate more effectively. This is not intended to be an all inclusive list. Each person's situation is different. Please let us know if there are any other topics you would like to discuss so that we may best serve your needs.



## WHAT KEEPS YOU UP AT NIGHT?

Please take a minute to review the topics and related questions below. Check off any concerns you have right now. Chances are I have information that will help us address many of the issues that may worry you.

### RETIREMENT

- Will my money last through retirement?
- Do I need long-term care insurance?
- What are my retirement investment options?
- How do I manage all my retirement plans?
- What should I consider before claiming Social Security?
- What should I do with my employer retirement plan?
- Since I am retiring soon, what do I need to do now?

### EDUCATION PLANNING

- How much should I save for college?
- When should I start planning?
- Will I qualify for financial aid? Where do I start?
- What are my college savings options?

### LIVE EVENTS

- How do we manage our finances after getting married?
- What happens to my 401(k) when I change jobs?
- What are my options if I am laid off?
- I am getting divorced. What happens to my assets?
- How do I help my recent college grad transition into the workforce?
- What do I do when a loved one dies?

### ELDERCARE

- How does Medicare work?
- What should I look for in a nursing home?
- How do I cope with Alzheimer's disease?
- What happens if I have to care for my parents?

### ESTATE PLANNING

- What should I know about estate planning?
- How do I protect my estate from taxes?
- Will my family be secure if something happens to me?
- How do I create a legacy for my children?
- Can I provide for my favorite charity when I am gone?
- What will my survivors need to know?

### FINANCIAL BASICS

- How do I keep my records safe and organized?
- How do I do a better job budgeting? How do I reduce my debt?
- How do I teach little kids about money?
- How do I help a young adult establish a financial strategy?
- How do I have financial discussions with family?