

AO

WEALTH
ADVISORY

Set Your Financial Goals

IT ALL STARTS WITH A PLAN



Urbandale, Iowa

515-224-7849



Set Your Financial Goals

Saving for retirement?
Looking to buy a house or save for your kids' college?
Or wanting to save for next year's vacation?
Financial planning starts with setting your goals.

PLAN AHEAD TO REACH YOUR GOALS



The sooner you start planning for your goals, the better prepared you will be to reach them. Listing all of your financial goals can help you fine-tune your financial picture. By working with a CFP® professional, you can get help to figure out how to prioritize these goals, as well as the amount of money you need to save from each paycheck to reach them.

BALANCE YOUR SHORT- AND LONG-TERM GOALS

A CFP® professional can also explain how you can balance your shorter-term goals with the long-term goal of retirement security. As you get older, you can start to envision retired life more clearly and can set more specific retirement goals.

How much will you need to cover your regular expenses, and what else would you like to do with your money? Would you like to save for a big family trip or a vacation home? Do you want to start a business or make a significant donation to a charity? If you plan in advance, it can be exciting to brainstorm all of the things that you would like to do in retirement, and then work with your CFP® professional to set a plan in motion to reach those goals. Your CFP® professional is also trained to help you protect your savings from risks that could derail your plans, such as a loss of income, a market downturn or the high cost of long-term care. You want to worry less about the unexpected, and spend more time looking forward to the goals you've been dreaming about for years.

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