

What to discuss with your advisor when it comes to ...

Family

- Do you have children from multiple relationships? What do those relationships look like now, and what do you expect them to look like in the future?
- Do you have any children or family members with drug dependency issues or mental health challenges?
- Do you have any estranged siblings?
- Is your marital status changing, or do you expect it to?

Health

- Do you have a family history of any chronic illnesses?
- Are your parents still alive, and how is their health?
- How do you plan to pay for healthcare in the future?
- Who will take care of you if you need assistance as you age?
- What are your preferences around long-term care, should you need it? Would you rather stay in your home or move to a community or group care setting?

Career

- Are you really happy with your current career?
- What do you think your chances of advancement and a raise are?
- What would you do if your job went away?
- Do you plan to be your own boss or split from your current company to form your own?
- Is your employer changing anything about the benefits it offers you?

Passions

- What motivates you? Is it money? Success? Something else?
- What causes do you and your family support?
- What do you do outside of work, and why does it matter to you?
- What are you hearing from friends or family about money or investing that you think is interesting?