MEETING CLIENT *Milestones*

Are you planning for your clients' whole lives? Help them on their financial journey by considering the life stages and major events that shape your clients' futures.

YOUNG ACCUMULATORS

AGES 18-40

FOCUSED ON
- Growing earnings
- Achieving short-term financial goals
- Starting to save for retirement

MAJOR LIFE EVENTS
- Marriage
- Children
- Career changes

EXPERIENCED ACCUMULATORS

AGES 40-55

FOCUSED ON
- Minimizing the retirement gap
- Preparing for unexpected life events
- Maintaining their established lifestyle

MAJOR LIFE EVENTS
- Kids in college
- Divorce
- Job Loss

PRE-RETIREES

AGES 55-65

FOCUSED ON
- Shifting assets toward retirement
- Assisting grown children and aging parents
- Transitioning out of their work or business

MAJOR LIFE EVENTS
- Selling a business
- Children getting married
- Parents needing caregivers

RETIREES

AGES 65+

FOCUSED ON
- Adjusting to their new lifestyle
- Creating estate plans and charitable giving strategies
- Planning for potential health needs

MAJOR LIFE EVENTS
- Retirement
- Death of spouse

Learn More

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