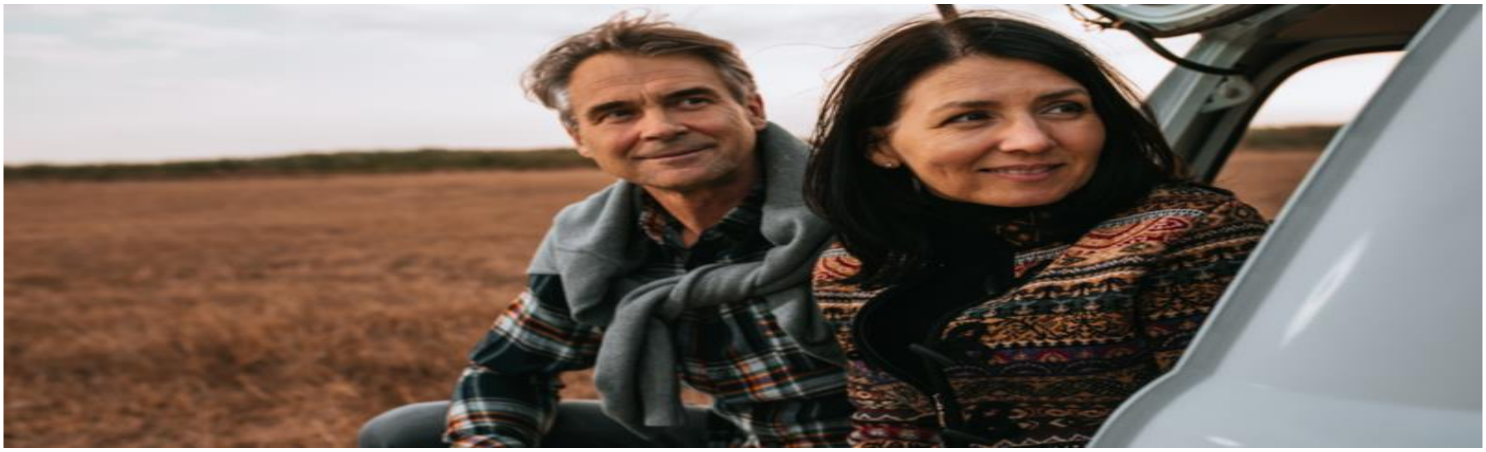

5 Ways to Help Manage Multiple Goals

Retirement is a huge goal, but it probably isn't your only financial objective.

Other significant milestones in your future might be buying a second home, taking your dream trip or helping your kids or grandkids with college.

How do you manage – and make progress toward – multiple goals?

- **Establish your goals:** Before you worry about managing all of your financial goals, take the time to define them clearly. Understanding what you want (and when you want it) will help you plan appropriately.

- **Calculate your earning potential:** Determine your earning potential from your career and your investments. How much do you expect to earn during your remaining working years? What about your investments?

- **Set a realistic timeline:** Now that you've established the foundation for your plans, you can start crunching the numbers to set specific savings goals and even dates for when you'd like to reach each of your objectives.

- **Stay flexible:** As essential as it is to plan, it's just as important to stay flexible. Remember, your returns and salary could change, inflation could come into play, and life events could cause you to recalibrate and adjust at any time. The steps you take today may end up being a guide rather than an exact blueprint.

- **Reach out for assistance as needed:** You know your finances, but we can still help you plan for your short-term and long-term goals by creating a plan tailored to your risk appetite and vision.

Do you have questions or want to check in? Reach out today.

The highest Compliment you can give your ROI Financial Advisor is to refer them to someone special like yourself. We thank you for your business & most recent consideration.

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We help clients get back to the basics of building & maintaining wealth in a tax efficient way.

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