

'Can We Talk?'

*Excerpts from The Wall Street Journal
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1. "Do we really want to retire and if so, when?"
2. "What is our vision of Retirement – and do we share the same vision?"
3. "Where do we want to retire?"
4. What's our strategy for building and preserving a nest egg?"
5. "What assets do we have for retirement – and are they invested in the most beneficial ways to achieve our goals?"
6. "How much money we will need to support our lifestyle in retirement?"
7. "Do we have an estate plan – and where is it?"
8. "What will our legacy be?"
9. "What kind of relationships – personal and financial – do we want to have with our children and parents in later life?"
10. "How will each of us approach, and manage, getting older?"