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Wealth Planning Overview

Your goals are as unique as you are. That's why we work with you to understand your needs and how you envision a successful life. Then your advisor works together with you and members of our team to help you build a personalized plan. It all starts with a conversation that helps us bring your full financial picture into focus. We can discuss these topics and more:

Achieving goals

From long-term goals to unexpected needs, we can help you plan for whatever matters most in your life.

- Retirement
- Health care
- College
- Estate
- Charity

Retirement income planning

You work hard to save for the future. We can help you build a plan that's designed to support the lifestyle you want in retirement.

- Retirement readiness
- Income generation
- Social Security and benefits
- Health and long-term care costs
- Employee benefits optimization

Investment solutions

We can help you build and manage an investment plan based on your personal situation and preferences.

- Professional investment management
- Specialized investment services
- Strategies for market volatility
- Self-directed investing with robust tools

Tax considerations

We can help you identify and implement tax-smart techniques designed to help you keep more of what you earn.

- Tax-sensitive investment management
- Tax deferral strategies
- Tax reduction strategies
- Roth IRA conversions

Leaving a legacy

Providing for the people who matter most to you can be very fulfilling. We can help you navigate those conversations.

- Beneficiaries and titling of assets
- Gifting strategies
- Estate planning
- Preparing and involving your family

Topics and questions are designed to help give you insights and items to consider when planning for your future. They are intended for educational purposes only, and may not be relevant to your plan. Fidelity does not provide legal or tax advice or prepare estate plans. Please consult an appropriately licensed professional for advice on your specific situation.

Understanding what's important to you

The more we know about you, the easier it is to help you build a plan that's customized for your unique needs and aspirations. We can get started by discussing questions like these and by helping you establish clear next steps. Please take a moment to note your thoughts below.

What goals do you have for your money, now and in the future?	Who are the important people in your life that you would like us to know about as we help you plan?	What's most on your mind as you plan for retirement?	What does leaving a legacy mean to you?

Your next steps