

Questions to ask Advisor Support

Comprehensive Financial Plan

“What should I be thinking about?”

Our focus is your overall savings and retirement planning, but in the world of financial planning there are many additional topics to consider – estate planning, insurance coverage, managing debt, saving for education and more. We can help you identify areas you should prioritize to secure your financial future.

“Should I work with an advisor? Can I afford it?”

If you have any key life events in your near future – getting married, having kids, approaching retirement, etc. – these are great reasons to establish a relationship with an advisor. Before you choose who to work with, it’s important to understand the different types of services available, associated costs, and other things to consider in working with an advisor.

Investment Options & Savings Strategy Recommendations

“How much should I be contributing? What is the difference between Pre-Tax and Roth? Am I contributing enough to get the full benefit of the company match?”

Share with us your current financial needs and constraints and your long-term financial goals, and we can help you determine how much to contribute and what kind of contribution that should be.

“Are my current investment elections going to help me achieve my retirement goals? What is a Target Date Fund? What are the Brighton Jones risk-based model portfolios?”

We can help you understand the different investment options available in your retirement plan and which may be best suited for you based on your retirement goals.

Equity Compensation (Stock Options, RSUs, etc.)

“Can you help me understand my equity compensation? What should I be thinking about regarding stock options and RSUs?”

When you (or your partner) have complex compensation structures, it can be important to consider how they factor into your financial plan. We can help you understand what to consider when setting your goals and building a strategy.

Estate Planning & Insurance

“What is an estate plan? When do I need to consider creating a will? What are the risks to my family if I don’t have one?”

To ensure that your assets will be distributed to your family members, other individuals, or the organizations that you care about most, consult our Advisor Support team about when and how to set up a will and other essential estate planning and insurance policies.

Retirement Withdrawal Strategies

“What kind of distribution can I take from my 401(k) or 403(b) account?”

Understand the kind of distribution capabilities offered in your employer’s retirement plan and the fees associated with each option.

Brighton Jones Advisor Support Team

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Schedule a free appointment: <https://go.oncehub.com/AdvisorSupport>