

Life-Cycle Events that have motivated people to call us for an appointment

By Keith M. Lichtcsien, CFP®, AEP®

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JOB RELATED

- Selling a business or transferring ownership
- Purchasing a business
- Starting a business
- Retiring
- Changing jobs
- Losing a job
- Earning a large promotion or bonus
- Losing a business partner or owner to death or disability
- Starting or changing Qualified Retirement Plan

FAMILY RELATED

- Receiving an inheritance
- Experiencing a recent death in the family
- Becoming a widow
- Becoming terminally ill yourself or a spouse becoming ill
- Transitioning a loved one into a nursing home
- Having a child
- Becoming a grandparent
- Owning property one wants to leave as a legacy to their heirs
- Getting divorced

TAX RELATED

- Phantom income problem
- Paying a huge amount of tax on anything
- Turning age 70 ½
- Realizing you have or will have a taxable estate

OTHER

- Moving
- Coming to the conclusion that he/she no longer has confidence in current advisor
- Becoming or being highly successful in a small town and looking for privacy by seeking an advisor in another community
- Realizing you need a plan to achieve or maintain “Financial Independence”

As always, please feel free to call us at 216-765-0121 regarding this or any planning related questions.