LIFE STAGES

Support for every chapter of life

Financial questions change as life does. Find your stage, see what might be worth a look, and talk it through with your Pathwise team.

1

New to the job

It might be time to: Understand your benefits; set retirement goals; consider protection for you and your family.

Many people spend little time reviewing workplace benefits. We help you see how they fit together.

2

Growing family

It might be time to: Revisit your budget; review life and disability insurance; think about wills and guardianship.

Guardian Plus brings insurance, budgeting, estate planning and 1:1 support together for parents and caregivers.

3

Life changes

It might be time to: Marriage or divorce, buying a home, a promotion or new job, caring for aging parents.

A qualifying event is a great time for a check-in.

4

Nearing retirement

It might be time to: Can I retire when I want? Am I saving enough? How will I turn savings into income?

Retirement Plus resources include the Retirement Roadblocks course and a Lifetime Income Model.

5

Retired

It might be time to: Plan income, manage taxes and healthcare costs, and keep your legacy plans current.

If you're working with a Pathwise advisor when you retire, you can keep working with that advisor.

PROGRAMS BY LIFE STAGE

Find the right fit

Financial Wellness

For everyone

- Self-help resources and webinars
- Sage assessment
- 1:1 consultations with financial, insurance and tax professionals

Guardian Plus

For parents & caregivers

- Insurance options
- Budgeting tools
- 1:1 advisory support
- Investment support
- Will and estate planning
- Monthly education

Retirement Plus

For retirement-focused employees & leaders

- Retirement Roadblocks course
- Lifetime Income Model
- Specialized planning: income distribution, Social Security, risk management

Which stage are you in?

There's no wrong answer. Take the assessment, then tell your advisor what's happening in your life. They'll point you to the right resources. Financial Wellness, Guardian Plus and Retirement Plus are available at all employers.

Big change coming up?

Book a complimentary conversation to talk it through.

Book a meeting