

Taking charge of your financial future



Assess your current situation

- Work with a financial planner to create a holistic financial plan.
- Identify any areas that need improvement.
- Set goals to close the gap between your current and ideal situation.



Invest in yourself

- Build your human capital by increasing your education and job skills.



Manage your career

- Negotiate your salary and benefits.
- Consider the potential costs of taking time out of the workforce.
- Stay connected during absences from the workforce.



Build your wealth

- Live within your means.
- Build an emergency fund.
- Plan for the costs of a family.
- Make retirement savings a priority.



Protect your assets

- Use appropriate insurance.
- Build and maintain good credit.
- Divorce-proof your finances.
- Make sure your estate plan is in order.
- Thoughtfully choose your advisors.

