

Top Financial Concerns of Professional Women

Topics to consider today as you plan for tomorrow



Women are frequently pulled in many different directions. Oftentimes, juggling the responsibilities of a career, family and household leaves very little time to attend to financial issues. However, a little planning today can save you, and your loved ones, from stress and uncertainty in the future.

Here are the top concerns faced by many professional women, along with some simple steps you can take today to prepare for tomorrow.

Education planning (saving for college)

If helping pay for your children's college education is a goal, consider the various investment vehicles that may help you along the way. Regular contributions to a 529 plan can be a great start. The key? Save early and save often. Even small, regular contributions today can make a difference down the road.

Work-life balance

Women who feel pressure to be perfect in every aspect of their lives often find themselves falling short. It's important to focus on what's important and delegate responsibilities that do not bring fulfillment. If you're able, hiring a house-cleaner can free up valuable free time to spend with your loved ones or pursuing a new challenge at work. Working with a wealth advisor is another way to delegate responsibilities and gain peace of mind that your financial life is well cared for.

Transition planning

One of the most difficult challenges faced by men and women alike is an unexpected life event, such as a divorce, unexpected career change or the death of a loved one. While it's impossible to predict whether such an event will occur, it is possible to take precautions such as ensuring your account beneficiaries are up-to-date, establishing an emergency fund and ensuring you have adequate insurance coverage.

Essential documents

It's important to know that your careful planning can easily be derailed if you don't have the proper documentation in place. Be sure to establish the following documents and update them any time you have a change in your current situation or objectives: will, trust, healthcare directive, power of attorney, beneficiary designations, etc.





Health insurance

Another challenge to your financial planning can result from an unexpected health challenge faced by you or a loved one. Take care to select the best health insurance coverage for you and your family.

Retirement planning

How much will you need during retirement? How much should you be saving today to reach your goal? What types of retirement accounts are most appropriate for your specific situation? Are your investments in line with your objectives? These are important questions that an experienced wealth advisor can help you answer to ensure you're on track to achieve your retirement goals.

For more information visit: marinerwealthadvisors.com

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