RETIREMENT:
- Will I have enough to retire and when can I retire by?
- Should I change my investment approach in retirement?
- When should I start my Social Security benefit?

COLLEGE:
- What's the best way to save for college and how much should I be saving?
- How should my college savings plan(s) be invested (age-based vs static)?

TAX PLANNING:
- I am self-employed, should I have a Solo 401(k), SEP IRA or something else?
- What are the tax implications of moving to a lower tax state?
- Which account should I withdraw from in order to get monthly cashflow: my IRA or another account?
- How do I get a tax benefit from charitable contributions if I don't itemize deductions?

INVESTMENTS:
- What is an appropriate investment strategy for me?
- How do I manage my employers' various stock programs: options, restricted stock, purchase plans?
- Concentrated stock – how much employer stock is too much?
- Which assets should be in my IRA account versus my non-IRA account?

INSURANCE:
- Do I have enough life insurance?
- Should I keep my old life insurance policy?
- How does Long-term care insurance work, do I need it, and can I afford it?

ESTATE:
- Why do I need a will? A power-of-attorney? A healthcare directive? Are trusts appropriate for me?
- I am in a second marriage. How do I provide for my children from my first marriage?
- Will there be estate/inheritance taxes at my death?
- I want to help my child(ren) financially while I'm alive, not at my death. Can I afford to make a gift and if so, how?

MISCELLANEOUS:
- Should I pay off my mortgage?
- Can you help me review my employee benefits?
- Can you help me with financial planning for my elderly parents?