



HAMPTON PARK

FINANCIAL PLANNING

Financial planning is needed at almost every corner of our lives. There are many core subjects covered in our practice. The following are a few examples of when to contact/update us. If you're still not sure, please reach out!

Career

- I am preparing for a sabbatical
- My salary increased/decreased
- I want to change jobs
- I received a job offer
- I'm thinking about retiring
- I want to switch careers
- I received a job offer
- I received new benefits at work
- I received a bonus at work
- Stock Options and tax considerations

Business Planning

- I want to sell my business
- I want to start a business but don't know how to fund it
- We want to expand our business tax-efficiently
- Small business retirement planning
- Executive compensation considerations
- Business healthcare planning
- Company retirement plan build

Life

- We are experiencing changes to our budget
- There has been a death in the family and we are receiving an inheritance
- We need assistance with special needs planning
- I want to go back to school
- We need help consolidating and organizing my financial life
- We are having a baby!
- Student loans and public service loan forgiveness
- I want to buy a...
- My priorities have changed
- My parents/siblings need financial assistance
- We need a new car, do we buy/finance/lease?
- We want to budget more for traveling

Tax Planning

- I have questions about how my investments are taxed...
- Tax loss harvesting
- I received my tax refund, now what...
- American Opportunity Tax Credits
- Lifetime Learning Credits
- IRAs, HSAs, FSAs, and Roth IRAs
- Charitable minded strategies

Other

- Can you look at our investments?
- Am I taking advantage of my company 401(k)?
- We need a higher level of service from our advisor
- My friend has a financial question about
- Do you know a realtor/contractor/ lender, etc.?
- Do you know an estate planning attorney?
- Do you know a CPA who's proactive and informative?
- We want to invest in real estate and wonder how it could impact our finances