

Some of the Questions our Clients Ask

- Should I refinance my mortgage again?
- Should I lease or buy a car?
- Should I invest in a 529 plan? If so, which one?
- I'm scared. Should I get out of the market?
- Look at my total investments. Is my allocation right?
- How should I diversify my large position in my employer's stock?
- Did my mother's broker rip her off?
- Do I have enough to retire?
- Is charitable giving an appropriate estate planning tool for me?
- Should I continue the life insurance policies that I have?
- How much can I spend in retirement?
- If I change jobs, how will my benefits compare?
- We are getting divorced. What are the things I should consider?
- How much salary versus sub-s <?> distributions should I take?
- Should I lock in my student loans?
- Am I carrying enough property casualty insurance?
- What is the best way to protect my assets from creditors?
- I have too much debt. What should I do?
- I need a good accountant. Who do you recommend?
- All my friends have a living trust. Do I need one?
- I live alone and am getting older. How should I protect my finances?
- Should I use a Roth IRA or a regular IRA?
- Is my budget reasonable?
- Do I need life insurance on my children?
- How should I make gifts to my family members?
- I was offered an alternative investment. What do you think?
- What is the role of an executor and trustee? A custodian?
- I am being offered an out-placement package by my company. Should I take it?
- How should I negotiate my new employment contract?
- We are not married. How should I protect my partner in my death?
- Do I need long term care insurance? If so, what should be the policy provisions?
- If we want financial aid, what is the best way to own assets for our children's college education?
- The income from my investments is declining. Why? What should I do?
- What do you think of ABC stock? Mutual funds? A, B, C, D and Z shares? Annuities?
- What is the best way to ease out of my business and transfer ownership to my children?
- When should I exercise my company stock options? What are the tax issues?
- Are my health and retirement plan best for my small company? Are the terms of my health plan okay?
- Is my Social Security calculated correctly? Should I begin taking it at 62?
- How much and which type of life insurance do I need? Do I really need disability insurance?
- Am I missing out on tax saving strategies?
- How do I get out of this insurance contract? What does the contract really say?
- I think my mother may have Alzheimer's. What are the steps to get help from Medicaid?
- Should I take a 15 or 30 year mortgage? Fixed or variable? Should I pay down my mortgage?
- I need some simple (or complicated) estate planning. Which lawyer do you recommend?
- How much of my children's college education should I plan on paying?
- Should I use a custodial account for my children? or grandchildren?
- Is my estate plan still appropriate given changes in the estate tax laws?
- How much should I save in my retirement plan? College funds? Improve current lifestyle?
- How do I get key non-stockholder, non-family employees excited about our business?
- I have a short time to live. What should I do to maximize my income and estate taxes for my heirs?
- I don't understand the estate planning documents I have. Are they OK for my situation today?
- How should my beneficiaries on my IRAs and company plans be worded?
- What is the benefit of a payable upon death or designated beneficiary for my brokerage account?
- One of my children has joint owner of my brokerage account. Is this OK?
- This is our second marriage. How can our estate plans be fair to our kids from our first marriage?
- What is the difference between a power of attorney (POA), a POA for health care and a living will?
- How much can I put away in a SEP, a Simple IRA, a profit-sharing plan, a Roth or regular IRA, an individual 401k?
- How should I take maximum advantage of my employer's cafeteria compensation plan?

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