White Hawk Wealth Management

Presents

Financial Planning & Wealth Course for Young Professionals

SESSIONS

1. FEES - The different ways that financial professionals get paid and different investments charge.

2. PLAN IT OUT - We will work together to create a financial plan that will evolve as you do.

3. TAXES & SAVINGS - There are different ways to save money and different rules for how the monies are taxed on the way in/out.

4. INVESTMENTS - Education on the different types of investments and how to navigate the “ocean” of options available.

5. PORTFOLIO CONSTRUCTION - We work with you to design a portfolio that will align with your risk and financial goals.

6. INSURANCE - Take a look at the use of insurance and how your needs will change as you get older.

7. PARENTS - Dealing with aging parents and how long-term care works.

www.WhiteHawkWealth.com