NARROW GATE
Wealth Management

CONVERSATIONS WITH FUTURE GENERATIONS

Creating Confidence For Heirs By Teaching Wealth Management Basics

You've worked hard to accumulate and manage your wealth. When it comes time to transfer that wealth to your children or grandchildren, it can give you peace of mind if you know they understand the basics of wealth management.

For your loved ones, we can offer advice that includes how to save, spend and invest wisely. Below are a few topics we'll provide education on to help your loved ones build confidence as they inherit wealth.

STUDENT:

- Taking control of finances
- Importance of credit
- Saving; investing
    - Emergency fund
    - Roth IRA
- Creating a spending plan
- Student loan planning; debt management

WORKING YEARS:

- Life insurance
- Estate plan
- Employer benefits review
    - 401(k) allocation; rollover
    - HSA
    - Disability insurance
- Family goal planning; education planning
- Home decisions; buy vs. rent
- Care for aging parents