
FINANCIAL FRIDAYS nymeo Federal Credit Union

10 Financial Questions to Ask Yourself



There are many questions you should ask yourself about your financial life. Can you answer the questions below? If you can't and do not know where to start, we can help!

1. How much do I spend each month? Do I have a spending and savings budget?
2. What is my current net worth?
3. How much am I investing and what will that provide me in the future?
4. Am I saving enough in my retirement plan? Are my retirement savings invested properly?
5. How much do I have set aside for emergencies? Is what I am saving enough?
6. Do I have enough insurance to protect my family and their future if something were to happen to me? What about long-term care?
7. Is my estate plan up to date? Do I have a will, a durable power of attorney, a healthcare proxy, and/or a trust?
8. Am I doing the best I can to reduce my income taxes?
9. How are my investments allocated? Do all my accounts fit together?
10. Are my account beneficiaries up to date?

Interested in getting assistance?

Carmen, as a Nymeo member, remember that you have access to two seasoned financial advisors, Anna Behnam and Irene Tata, who can help you address these questions and more. Schedule a time to meet with them.

[Schedule a Complimentary Consultation](#)



Anna A. Behnam
Financial Advisor



Irene Tata
Financial Advisor

How much does a financial advisor cost?

Your initial meeting with Anna or Irene is complimentary! Depending on your specific need, as well as the complexity of your situation, you may choose to pay for additional options. [Schedule a time to speak with them at your convenience.](#)

Investment products are not federally or NCUA-insured, are not deposits or obligations of, or guaranteed by any financial institution, and involve investment risks including possible loss of principal and fluctuation in value.

The initial consultation provides an overview of financial planning concepts. You will not receive written analysis and/or recommendations.



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