Build a budget that works for you

Build a budget that works for you (cont.)

1. Gather your tools.
2. Pick your method.
3. Make adjustments.
4. Review, review, review.

“Build a budget that works for you”

Edward Jones: The Four Pillars of the New Retirement (an Edward Jones and Age Wave study).

Probate is a court-supervised process in which a deceased individual's property is transferred to the beneficiaries identified in their will, or to their heir(s) if the individual died without a will. Edward Jones, its employees and financial advisors are not estate planners and cannot provide tax or legal advice. You should consult your estate planning attorney or a qualified tax advisor regarding your situation.


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Set boundaries for “boomerang” kids

Grown children may move back home. You have to make it a balancing act.

Plan ahead: Preparing for a job loss

You’ve probably heard it before but have an emergency fund.
Build a budget that works for you

Plan ahead: Preparing for a job loss (cont.)

Revisit your budget and live within your means.

Plan ahead: Preparing for a job loss (cont.)

Have a game plan for your benefits.
Build a budget that works for you

Plan ahead: Preparing for a job loss (cont.)

Keep your skills sharp and your resume current.

Following bad financial advice can be costly

Negative guidance typically arrives in three forms:
1. "Hot" tips
2. Rules of thumb
3. Myths

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Build a budget that works for you

Following bad financial advice can be costly (cont.)

Better advice considers the following proven suggestions:

1. Follow a personalized, goals-based investment strategy.
2. Understand the nature of risk.
3. Put time on your side.

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More information available

- This month’s issue of Edward Jones Perspective contains more in-depth coverage of the topics discussed today.
- Please be sure to complete your seminar evaluation form.
- Please contact me with any further questions or to schedule an appointment.

Thank you for your time!