Gen Y Planning

Quick Start Session Overview

If you're saying to yourself, "I'm not quite ready to work with a financial planner on an ongoing basis. However, I still have a few pressing financial questions that I'd like help on. What should I do?"

Answer: Try a Quick Start Session!

This session includes:

- A 90-minute video call

- An in-depth discussion of your 2-3 most pressing financial topics. Popular questions include:
  - *Which payment plan should I choose for my student loans and how can I pay them off faster?*
  - *How do I sign up for my 401(k) and choose the investments?*
  - *Can you help me with a budget or spending plan?*
  - *How much should I set aside for emergency savings vs. savings for other goals?*
  - *What steps can I take to improve my credit and which credit card is best for me?*
  - *How do I start a Roth IRA and where should I set up the account?*
  - *Can you help me read my company benefits package and choose my benefits?*
  - *How much and which kind of life insurance should we have if we just had a baby?*

- A follow up email with recommendations and an action checklist within 24 hours so that you can take action right away!

Cost: $499

Apply for a Gen Y Planning Quick Start Session here:
www.genyplanning.com/apply

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