## Helping clients navigate life events

## Life events that require financial planning expertise

4	Disability	4	Critical Illness	Education Planning	\$	Sales Of Assets	4	Premature Death In Family
°	Wealth Transfer	\$	Inheritance	Market Volatility	-	Early Retirement Option	-	Job Loss
	Severance Package	\$	Commute Pension	\$ Salary Increase	-	Promotion	-	New Job
	Now Self-employed		Divorce	\$ Lottery Proceeds	\$	Unexpected Bonus	å	Exercise Options
	Sale Of Real Estate		Downsizing Home	Selling Recreational Property		Marriage		Birth Of Child
	Financial Stress		Business Expansion	\$ Buying Business	\$	Selling Business		New Business Partner

Iconography retrieved from *Flaticon*.