



**KING** wealth planning, inc.  
*Retirement is a Journey. Let us be your Guide.*

## Your Financial Milestones

*"The best financial advice I ever received was from my grandmother. She said that it doesn't matter how much money you make, what matters is how much you save."* - Sigi

### Age 20-30

Start Saving!

Set a goal and save a set dollar amount each month.

### Ages 30-40

If you have children start a 529 college savings plan.

Evaluate your life & disability insurance needs.

### Ages 40-50

Maximize savings.

Make sure that you have an estate plan and that your beneficiary designations are up-to-date.

### Ages 50-60

Make a choice on long term health care protection.

Make a plan for your future financial independence.

### Ages 60-70

Evaluate your Social Security claiming options.

Look into health insurance options and Medicare supplemental policies.



### Ages 70-80

Set-up an income plan from your investments.

Organize and consolidate your important information.

### Ages 80-90

Update your estate and legacy wishes.

Write a living will.

### Ages 90-100+

Have fun!!

### When should you see a financial advisor? NOW

*The sooner you start the sooner you will find your path to pursuing a successful financial future.*

[www.kingwealth.com](http://www.kingwealth.com)

2105 S. Bascom Avenue, Suite 148 • Campbell, CA 95008 • 408-879-0789 • 1-800-59-ADVISE • [inquiry@kingwealth.com](mailto:inquiry@kingwealth.com)

*The Financial Professionals at King Wealth Planning, Inc., are registered representatives with and securities offered through LPL Financial, Member FINRA/SIPC*

*Financial Planning offered through King Wealth Planning, Inc., a Registered Investment Advisor and a separate entity*