

Area-Specific Consultations

Often clients will desire objective advice in a particular area or for a particular occasion. Areas of YFP's consultation expertise (and the type of question which would drive our interaction) include:

- Cashflow Metrics (Is my outflow properly aligned with my income?)
- Affordability Analysis (How much _____ can I afford?)
- Portfolio Review/Recommendation (Are my investments aligned with my goals, guts, timing, and values?)
- Retirement Timing (What kind of financial shape will I be in if I retire in 20__? What about 20__?)
- Monetary Navigation (Where am I? What lies ahead? What actions and vehicles are best suited for the journey?)
- Progress monitoring (Am I on the right track?)
- Scenarios (If I choose a course of action, what will the practical consequences be?)
- Dream Strategization (What practical steps must I take to get my dreams off the ground?)
- Windfall wisdom (How can I get the most mileage out of my unexpected money?)
- Finish Lines (How much is enough?)
- Risk assessment (What risks am I exposed to and how can I mitigate or avoid them?)
- "The Talk" (Can you help me organize a family meeting to get them on board with my _____ (estate plans, last wishes, etc)?)
- Planned Giving Strategies (How can I get maximum leverage from my generosity?)
- Financial Product Analysis (What do I need to know about what I own or have been recommended?)
- Team Building (Who do I need on my team to see my plans through?)
- College Affordology (How much college can I afford? How do I get more/save more school money?)
- Finance 101 (What do all these terms mean? Mean to me?)
- Second Opinion Services (What do you think of this idea my advisor had?)
- DIYer Sounding Board (What do you think of this idea I had?)
- Employee Benefits Guidance (How do I make sense of this packet HR gave me?)
- Savings Allocations (How can I best structure my savings for my short-term needs and goals?)
- Checklist Interaction (Are my basics in order?)
- Transitions (Life just changed/will change soon. What do I need to do and know now?)
- Socioeconomic Response (I don't like the way things are going, but what can I do about it?)