LEBENTHAL
GLOBAL ADVISORS LLC

WOMEN, WEALTH & WHAT MATTERS

Rosé & Real Talk

Your Summer Money Conversation Guide

15 questions worth asking yourself and the people you love — no binder, no spreadsheet, no formal meeting required.

1. WITH YOURSELF

- ■ Could I list every financial account, insurance policy, and debt I have?
- ■ Do I know where my estate documents and important passwords are?
- ■ Are my beneficiaries current?

2. WITH YOUR PARTNER

- ■ If one of us were suddenly alone, would the other know what to do?
- ■ Do we both know where the accounts, insurance policies, and important documents are?
- ■ Do we both understand what we own, what we owe, and who to call?

3. WITH YOUR PARENTS

- ■ Do you have a will, power of attorney, and healthcare directive?
- ■ If something happened, who is in charge, and where are the documents?
- ■ What is the plan if one of you needs long-term care?

4. WITH YOUR ADULT CHILDREN

- ■ Do you understand your 401(k), employer match, and other benefits?
- ■ What financial help, if any, are you expecting from me?
- ■ Do you know who to call and what I want if something happens to me?

5. WITH YOUR FINANCIAL ADVISOR

- ■ Am I actually on track for the life I want?
- ■ Am I holding too much cash, taking too much risk, or too concentrated in one investment?
- ■ Is my financial plan tax-aware and still aligned with my life today?

"The important part isn't what's in the glass. It's the conversation."

Start with one question. Share this guide with someone you love. Keep the conversation going.

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