

the 47 bistro

SAVINGS & RETIREMENT

Will we be able to retire? How much money will we need and what age will we be?

Can we still save for retirement with all of our day-to-day expenses?

In retirement, how will we be able to support our lifestyle without a regular paycheck?

PLANNING FOR THE UNEXPECTED

Do we have enough life insurance at this stage of our lives?

What happens if one of us were to get seriously ill or injured and could no longer work? What would our work benefits cover?

If one of us were to die unexpectedly, how would the family deal with the loss of our income?

AGING & LEGACY PLANNING

Do our parents have enough money to last their lifetimes? Will they be a financial burden on us?

What kind of legacy do we want to leave for our loved ones? And will we be able to do it?

The more we talk, the better we plan, protect and retire.

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STARTERS

47% of Americans struggle to have conversations with loved ones about long-term financial planning.

35% say their family doesn't have a financial plan in place for the future.

43% of those age 45-64 predict they won't have saved enough by the time they reach retirement.

40% don't think they'd have enough savings and assets beyond the immediate future if their partner fell ill.

29% don't know if their parents would be able to cover the costs of a medical illness in their old age.

45% believe their parents would rely on them to help cover those costs.
