



## Remarriage questions for your financial professional

Making a big change in your life triggers some big questions. A financial professional can help you work through the answers.

Print this list and have it handy when you're ready to start the conversation.

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- How should we approach the possibility of sharing assets?
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- Are my investment, retirement and college savings accounts still on track?
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- What is a good long-term strategy for our shared investment goals?
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- Is it a good idea to pay off our mortgage before we retire?

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- What is the best strategy for taking withdrawals from our retirement accounts?  
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- How do I transfer money to my children now and later?  
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- What's the difference between a will and a trust?  
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- What do I need to know about gift taxes?

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