

Subject: Financial Planning is for Everyone

Original Beginning:

It's a common misconception that you have to have a lot of assets before you invest in financial planning.

Choose one or more of the following:

- How can you explain what financial planning really is to someone who thinks it's only for the wealthy?
- What about your own background? How and when did you become interested in financial planning? Was it because your parents were investors? Did that inspire you to become more educated?
- How would YOU define financial planning?

Industry quote:

Whether you're a recent graduate trying to figure out how to handle student loans, a retiree looking to maximize your 401(k), or anything in between, we all want our money to work for us. "Americans need to understand that [financial planning] isn't just for the wealthy," explained Geof Brown, C.E.O. of the [National Association of Personal Financial Advisors](#). "It's important to sit back and reflect on your own individual circumstances, understanding your long-term goals."

[The New York Times](#)

Education (choose one or more):

- Give the reader 3 goal-setting questions or exercises that might help them understand more about financial planning.
- Can you explain a scenario with a previous client or in your own life when the result of some financial planning has been a feeling of relief?

Wrap Up

Much of what the reader might be feeling is helplessness or fear of the unknown. How can you wrap this up in a way that tells them you're here to help and answer questions? Or are there resources that you would recommend that you can list?