Discovering Financial Planning
Episode One: The Referral[1]
By Diana Bollenbaugh

"Argh!" Georgia tossed her pencil down in frustration.

"What's wrong," her friend Lani asked.

"I'm trying to get an idea of what I'll need to have for retirement," she replied. "Do you have any idea how many calculators and websites there are? I can't do this! There's too much information!"

"I know what you mean, it's overwhelming! If I were you, I'd see a Financial Planner," said Lani.

"A what?"

"A Financial Planner. They may be able to help roadmap all sorts of variables to help you stay on track for retirement or other goals. I'm so happy we have one."

"When did you guys do this?" asked Georgia.

"A few years ago. Max and I were trying to figure things out, too. Carl recommended we see one. We made an appointment. She listened to what we wanted and walked us through her process. It's very thorough."

"Did you get what you needed?

"Yeah, we did. I needed information, you know I'm a planner, and we both needed a reality check."

"How's your plan helped you? I mean, did you find it…. Don't you find it constricting? What happens if you don't get everything done right on time? Does it just become as expensive dust collector?" Georgia asked in frustration.

"This is what our plan did. It helped us to set mutual goals and find out what we both thought was important for our future. It helped ensure we had a solid foundation for our retirement. It's fact-based, not a whimsical best guess. It also gave us a visual map of where we wanted to go, financially," Lani stated.

"Wow, it does all that? Do you think it would be good for me?" asked Georgia.

"Yeah, I do," Lani enthused. "I think you would be amazed at what you find out."

[1] Characters and situation are fictional. Any resemblance to real people or events is entirely coincidental.

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