

financial planning considerations of **LGBTQ COMMUNITIES**

1.

Life insurance considerations for transgender individuals

2.

The titling of bank/investment accounts, as well as titling of a home

3.

Leveraging company benefits for family planning and/or health coverage

4.

Reviewing beneficiary designations after a marriage
(even if that person was your primary beneficiary before marriage)

5.

Tax implications of marriage

6.

Financial considerations when planning independently

7.

Considerations for blended families

8.

Planning for care later in life
(long-term care insurance, LGBTQ-friendly nursing homes, etc.)

9.

Understanding socially-responsible investments

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to serve the unique needs of diverse communities.*

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