## Recent Questions

<table>
<thead>
<tr>
<th>Category</th>
<th>Question</th>
<th>Helpful</th>
<th>Answers</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>INVESTING, CHOOSING AN ADVISOR, IRAS</strong></td>
<td>Is it normal for my broker to make over 50 trades in one year for one of my IRAs?</td>
<td>98%</td>
<td>5</td>
<td>6 hours</td>
</tr>
<tr>
<td><strong>INVESTING, IRAS</strong></td>
<td>How should a 24-year-old with $100,000 invest?</td>
<td>38%</td>
<td>5</td>
<td>6 hours</td>
</tr>
<tr>
<td><strong>RETIREMENT, ESTATE PLANNING, INVESTING</strong></td>
<td>How can I make my $250,000 inheritance last for retirement?</td>
<td>71%</td>
<td>6</td>
<td>6 hours</td>
</tr>
<tr>
<td><strong>CAREER / COMPENSATION, RETIREMENT, INVESTING, ASSET ALLOCATION</strong></td>
<td>How can I invest in my mid-20s with potential for high returns without tremendous levels of risk?</td>
<td>75%</td>
<td>3</td>
<td>6 hours</td>
</tr>
<tr>
<td><strong>DEBT, RETIREMENT, SOCIAL SECURITY, INVESTING</strong></td>
<td>How can my husband and I safely invest money made from the sale of our property to help us in retirement while we live in Mexico and travel?</td>
<td>74%</td>
<td>5</td>
<td>6 hours</td>
</tr>
<tr>
<td><strong>RETIREMENT, INVESTING, IRAS, REAL ESTATE</strong></td>
<td>I have $300,000 to invest; is early retirement on my horizon?</td>
<td>93%</td>
<td>2</td>
<td>6 hours</td>
</tr>
<tr>
<td><strong>FINANCIAL PLANNING, INVESTING, BONDS / FIXED INCOME, STARTING OUT</strong></td>
<td>I'm 46 years old and have no savings, but I have $1,000 to start investing; where do I start?</td>
<td>94%</td>
<td>3</td>
<td>6 hours</td>
</tr>
<tr>
<td><strong>PEINDS, ANNUITIES, ASSET ALLOCATION, BONDS / FIXED INCOME</strong></td>
<td>Is an annuity appropriate for me?</td>
<td>49%</td>
<td>3</td>
<td>6 hours</td>
</tr>
<tr>
<td><strong>BANKING, FINANCIAL PLANNING, RETIREMENT, RETIREMENT SAVINGS</strong></td>
<td>How can I grow my retirement savings without loss?</td>
<td>1%</td>
<td>1</td>
<td>6 hours</td>
</tr>
</tbody>
</table>

### Ask Your Question

Ask a question to help inform our advisors on what financial challenges are most on the minds of people like you.

### Top Advisors

- **Joshua Escalante**
  - CFP®
  - 99%

- **Dave Howan**
  - CFP®
  - 98%

- **Derek Notman**
  - CFP®, ChFC, CLU
  - 98%

- **David Rae**
  - CFP®, AIF®
  - 98%

- **Paul Sydlansky**
  - CFP®
  - 98%

- **Kevin Simpson**
  - CFP®, AIF®
  - 98%

- **Levi Sanchez**
  - CFP®, BFA™
  - 98%

- **Chad Rixse**
  - CRPS®
  - 98%

- **Rosemary Frank**
  - CDFA/ADFA, CFE, MAFF
  - 98%

- **Rose Swanger**
  - CFP®, RICP®, CDFA®, EA
  - 97%

- **Amy Kolp**
  - CFP®, AIF®
  - 98%

- **Shawn Turner**
  - CFP®
  - 98%

- **Kate Gough**
  - CFP®, RICP®, CDFA®, EA
  - 98%
What is the most tax efficient way of converting a pretax 401(k) to a Roth 401(k)?

Can you take the income from a qualified annuity and transfer it to another qualified annuity?

Advisor Articles

Including Digital Assets in Your Estate Planning
- With the increase in use of social media, cryptocurrency, and other digital assets, it’s important to include them in your estate plan.
- Elyse Foster

The Changing Faces of Financial Independence
- Financial independence means different things to different people, but the general premise is being able to enjoy retirement on your own terms.
- Trey Smith

Why You Should Invest in Foreign Markets
- Even if the U.S. market is currently outperforming foreign markets, here are some reasons you should still invest internationally.
- Kevin Simpson

The Impact of Properly Saving Your Money
- Properly saving money can be a challenge, but it provides many benefits, including the three discussed here.
- Andrew Rosen

Everything You Need to Know About Unclaimed Money
- You could have unclaimed money that you don’t know about. Be sure to check these resources to find out.
- Jack Brrich III