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“Ultimately, what a financial plan does is create a clear path and provide targeted goals that you can visualize,” says Amin Dabit, vice president of advisory services at Personal Capital. “It increases the chances of success for your overall financial life, but it also provides clarity for decision-making around important life events or life milestones.”

Personal Capital, which offers a mix of dedicated advisors and free digital tools, helps clients create—and adapt—financial plans that are tailored to their life goals, even as those goals change. These products and services can be chosen according to each client’s life stage and financial picture.

A newly (or soon-to-be) married couple, for example, might use Personal Capital to get a holistic view of their combined finances, even if they haven’t officially merged them yet. By entering all their personal financial accounts into their Personal Capital dashboard, they can see how their asset allocation breaks down, the areas in which they’re overspending, and how they’re progressing toward long-term goals.

“You can grab a glass of wine, pull up Personal Capital, and start talking about your financial future as a couple,” Dabit says.

A couple looking to grow their family might use the tools and advice to start figuring out how much they’re able to save for a child’s college education or a new house or home renovation. They can also run different scenarios to figure out the longer-term financial impact of paying for childcare, versus one parent electing to step back from the workforce.

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Dabit says Personal Capital offers people the ability to quickly and easily ascertain the state of their finances on their own, and they know they can speak directly with dedicated advisers when they need recommendations on next steps. That goes for people preparing for retirement in the near term as well as those who won't leave the workforce for decades.

"Being able to have a little clarity or a little more guidance on how things impact you financially oftentimes leads to making better decisions or allows you to react in a more thoughtful way when something comes up," he says. And a little goes a long way when you're talking about financial security throughout all of life's important milestones.

Any reference to the advisory services refers to Personal Capital Advisors Corporation, a subsidiary of Personal Capital Corporation. Personal Capital Advisors Corporation is a registered investment advisor with the Securities and Exchange Commission ("SEC"). SEC registration does not imply a certain level of skill or training.

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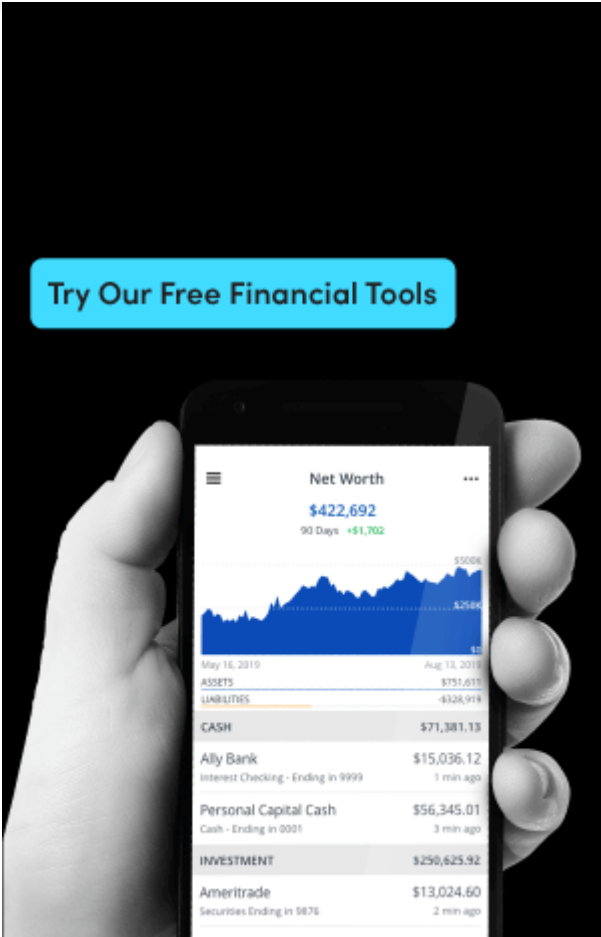
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Net Worth	
	\$422,692
90 Days	+\$1,702



May 16, 2019	Aug 13, 2019
ASSETS	\$751,612
LIABILITIES	-\$328,919
CASH	\$71,381.13
Ally Bank	\$15,036.12
Interest Checking - Ending in 9999	1 min ago
Personal Capital Cash	\$56,345.01
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By Mark H. Johnson

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