

Life Planning



At VestGen Chicago, we help you prepare for major milestones – from beginning a new career to leaving a legacy for your grandchildren. We create financial plans that addresses your immediate needs and future dreams.

Just Starting Out

It's never too early to start saving. While your primary concerns may be centered around paying for living expenses and kick-starting your career, being young gives you an edge if you want to build wealth for retirement. Developing a savings plan and investing early will allow you to benefit from compound interest, take more investment risks, and have a sound direction for achieving your retirement goals. We establish strategies for both short- and long-term financial success.

Starting A Family

Saving as a couple can have its advantages, but certain financial decisions are more complicated for couples. As your income is rising, your expenses may be as well. The financial decisions you make at this time can have the greatest impact on the financial lifestyle you enjoy in retirement. It's likely that your priorities have begun to shift, and accumulating savings has become critical. We work with you to develop savings plans for education, adjust investment strategies according to your risk profile, and ensure that your long-term plan will provide for you and your family.

College Funding

Education planning continues to get more and more complex. The costs continue to rise and the stress and anxiety for parents and students is at an all-time high. As part of a comprehensive financial plan, we guide you toward a strategy to incorporate an education savings plan within your financial planning goals. We listen to your objectives and provide personalized solutions so you can look ahead to a bright future for your child. We're thorough. We want to ensure nothing is overlooked as you begin this new chapter in your life.

Getting Married

You might be surprised by the amount of financial planning involved for newlyweds. From merging bank accounts to budgeting, it's important to get organized as you prepare to chart your financial future together. Our financial planners provide an objective perspective to help you think through budgeting, determining who will pay for what, and setting financial goals. We're thorough. We want to ensure nothing is overlooked as you begin this new chapter in your life.

Birth of A Child

The birth of a new child is a cause for celebration, as well as the potential for big financial and lifestyle changes. Education savings plans will need to be created, wills and insurance policies will need to be updated, and a list of new expenses will need to be managed. We help you get financially prepared to provide your new child with the life that they deserve. Our plans include inevitable expenses, like childcare costs, medical expenses, and college tuition.

Changing Careers

Whether you're re-joining the professional world, have recently lost a job, or are just looking for a new opportunity, embarking on a new career path can be an emotional time. Our advisors aim to alleviate any potential stressors by helping to budget and monitor everyday spending. In our experience, this process will help you feel more prepared and financially secure.

Life Planning



Opening A Business

Starting your own business is exciting! We clarify the type of budget you should consider for your business, as well as for your personal finances. We help clarify the type of retirement plan and benefit options most suitable for you and your employees.

Selling A Business

Selling a business can be life changing. It requires physical, mental, and financial preparation. It is important to look at your current financial state and consider how that may change after your business is sold. The most beneficial thing you can do when selling a business is plan ahead. We help you focus on your goals with the end in mind, by helping you develop a transition strategy. This ensures you are getting what you need before, during, and after the process. We then help you optimize your earnings through a financial plan to get the most out of your transition.

Estate Planning

Estate planning can help ease the tension of dividing assets among your loved ones. Done well, a proper estate will have set aside enough money for beneficiaries while ensuring your assets go where you want them to. You can also set aside funds for a funeral, leaving your family with less to worry about during difficult times. Our advisors can also help choose methods to decrease the amount of estate taxes, it also accounts for medical planning should for unexpected physical or mental health decisions.

For Established Business Owner

Our advisors walk you through all the important financial steps that can help your business grow and succeed. We discuss the different types of retirement plans that you might want to consider and help you choose one that is appropriate for the financial goals for both you and your business. Looking for employee retirement plans for your company? We're here to help!

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Retirement Planning

Our advisors work with you to ensure you have the resources to retire the way you want to. What do you see yourself doing in retirement? No matter what your age or your assets, this is a question that we all ask ourselves at some point during our lives. Careful financial planning is how your dreams can be realized. Retirement planning will likely be one of the most important components of your overall financial plan.

Investment Management

We have access to advanced research technologies that allow us to help our clients find the plan that will be most beneficial to each of them. We incorporate current thoughts on the economy and markets to ensure our clients are getting the most up-to-date advice. Additionally, we take the time to walk clients through and manage portfolio risk and transparency.