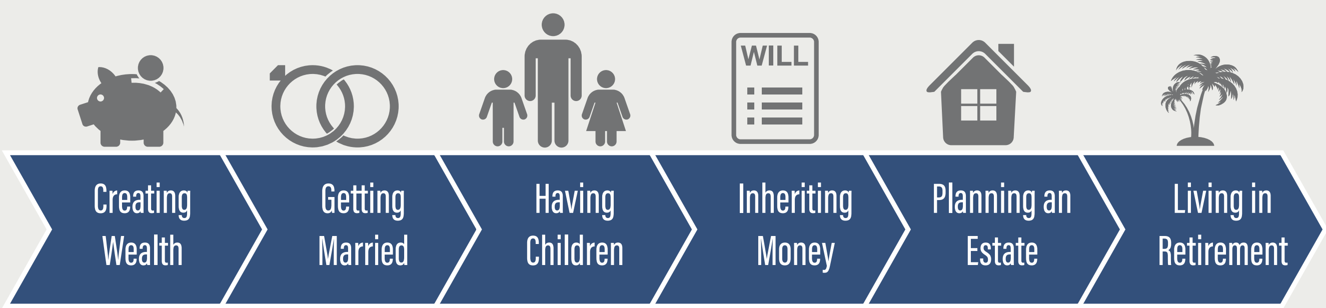
Wealth Management Aggregator

A resource guide for Advisors looking to navigate the wealth management landscape

A financial advisor's job is never easy. Guiding people through a lifetime of financial decisions requires a rare mix of expertise, empathy and resources. At AMG Funds, we understand this challenge well and remain fully committed to helping you help those who rely on you.

In that spirit, we created this wealth management advisor resource. We pulled together some of the best available resources in the marketplace to help you as you guide your clients along their financial journey. The guide goes hand-in-hand with our new Readiness Building Blocks series, which helps you navigate your clients' tax, wealth and retirement planning challenges.

Resources for Every Wealth Management Challenge



Creating Wealth

Provider	Title (link)	Format
Northern Trust	A Roadmap to Wealth Planning	Document
Business Intelligence	The Amazing Power of Compound Interest	Web
Fidelity	4 Reasons to Contribute to an IRA	Web
Schwab	Monthly Budget Planner	Web

Getting Married

Provider	Title (link)	Format
Fidelity	Getting Married Checklist	Web
Lifehacker	How to Merge Finances When You Get Married (Without Going Crazy)	Web
Money Crashers	18 Money Management Tips for Newly Married Couples	Web

(more resources on back)

Having Children

Provider	Title (link)	Format
SEC	An Introduction to 529 Plans	Web
Saving For College	World's Simplest College Savings Calculator	Web
Saving For College	Financial Aid Calculator	Web
Sallie Mae	Scholarship Search	Web

Inheriting Money

Provider	Title (link)	Format
Merrill Lynch	Handling New Wealth Checklist	Web
Fidelity	Inheritance Checklist	Web
Intuit	4 Ways to Protect Your Inheritance from Taxes	Web

Planning an Estate

Provider	Title (link)	Format
Fidelity	Estate Planning	Web
NerdWallet	10 Keys to Estate Planning	Web
Schwab	Asset Inventory	Document

Living in Retirement

Provider	Title (link)	Format
Fidelity	Planning for Healthcare in Retirement	Document
Fidelity	Understanding Social Security	Document
FINRA	Required Minimum Distribution Calculator	Web
Morningstar	Income Worksheet for Retirees	Document

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