



# Wealth Planning for Ambitious Parents

## Guidance to Help Set Your Children Up for Success While Securing Your Own Future

You want to both retire well *and* help your kids achieve their dreams. But you may feel under pressure since so many decisions have trade-offs today and in the future. By helping your children succeed, do you hurt your own financial ability to retire? Without knowing the right decision to make, you end up feeling paralyzed about making any decisions at all.

At Cascade Wealth Planning, we work with ambitious parents determined to set their children up for success without sacrificing their own financial future. Our process walks you through all the possibilities you are considering, such as child care, private school, pausing a career, or even retiring early, to help you make informed decisions. You receive comprehensive planning to help you quit worrying about the trade-offs and instead feel confident you can help your kids succeed while enjoying the retirement you envision.



## Common Questions

- How do we plan for the fact that we'll be retiring at the same time that our kids start college?
- Can we afford to step back from our career or retire early so we can focus on our family?
- What's the right balance between spending today and setting aside enough money for retirement?
- What are the trade-offs of our decisions, such as child care or being a stay-at-home parent?

**EMAIL** [chad@cascadewealthplanning.com](mailto:chad@cascadewealthplanning.com)

**ADDRESS** Belmont, MA 02478

**WEBSITE** [www.cascadewealthplanning.com](http://www.cascadewealthplanning.com)

## Guidance to Help Everyone Succeed

You want to give your kids the best life possible all the way through college and beyond without sacrificing your retirement. We don't think it should be an either/or proposition, which is why we provide wealth planning to help create great futures for both you and your kids. Our goal is to help you:

- **Remove uncertainty:** Know what you can afford to spend and still meet your life goals.
- **See the whole picture:** Understand the trade-offs and make informed decisions.
- **Have a plan:** Know how to fund goals like retirement and your children's education.

## You Face Unique Pressures

- Our process helps give ambitious parents the flexibility to make great decisions all the way through their retirement and kids' college years.
- Our founder, Chad Onufrechuk, personally understands the decisions high-achieving parents face.
- Chad draws on his personal and professional experience to help comprehensively address your challenges and meet your goals.

## Services

- Financial planning
- Investment management
- College planning
- Retirement planning
- Debt management
- Cash flow management
- Risk assessment and insurance recommendations

## Schedule a Call

Are you ready to stop feeling paralyzed about the trade-offs you face? Take the first step to help create great futures for both you and your kids. Schedule an introductory call today.

Visit [cascadewealthplanning.com](http://cascadewealthplanning.com).



**EMAIL** [chad@cascadewealthplanning.com](mailto:chad@cascadewealthplanning.com)  
**ADDRESS** Belmont, MA 02478  
**WEBSITE** [www.cascadewealthplanning.com](http://www.cascadewealthplanning.com)