Northstar

Personalized financial advice with Northstar

As a departing employee, you get free access to Northstar for the next three months. Northstar is a holistic financial planning platform that takes a personalized approach to helping you with your finances. You tell your personal Northstar financial advisor (CFP®) your financial and life goals, and they'll work with you 1-on-1 to create a custom plan to help you get there.

Personal financial advisor

Work 1-on-1 with a CERTIFIED FINANCIAL PLANNER™ via chat or video call to get advice on your financial priorities.

Custom financial plan

You'll get a personalized, step-by-step action plan that balances your expenses with your short- and long-term goals.

Personal finance tools

Create a realistic budget based on your income, expenses, and goals, plus work toward savings goals, retirement, and more.

Benefits decision support

Learn how to navigate COBRA, transition off of benefits, choose new benefits with your next employer, and more.

Life stage support

Learn how to adjust your financial plan following a change employment, buying a home, starting a family, retiring, and more.

Topics you can talk to Northstar about

- Paying off debt
- Saving for retirement
- Selecting your benefits
- Financially supporting family members
- Paying for education
- Saving for buying a home
- Understanding taxes
- Making insurance decisions
- Managing windfalls
- Investment advice
- Paying for medical care
- Family planning
- And more!

Contact **support@northstarmoney.com** to get started or learn more.

northstarmoney.com