

CAN I RETIRE?

How can I meet my retirement goals?

If you are in your late 50s or early 60s, now is the time to create a tangible picture of your retirement finances. Early planning gives you the opportunity to make adjustments that can improve your financial well-being in later life. Everyone wants a sense of financial security – here’s how we can help you.

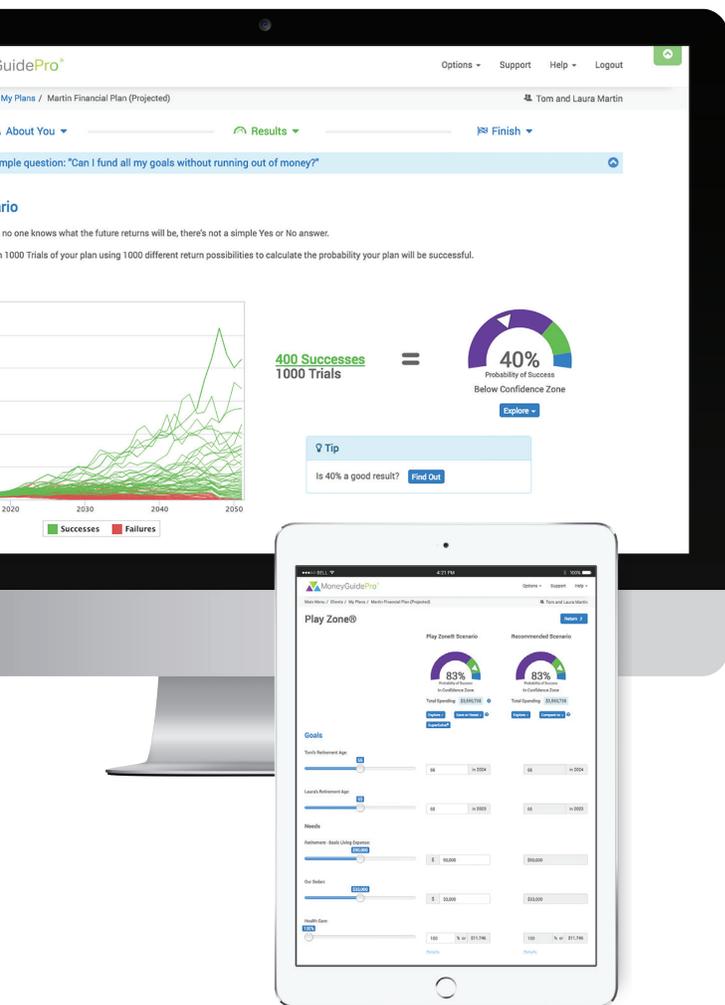
Building a retirement model

The process begins by gathering data and providing us with financial information related to your entire net worth. Next, we meet to talk about your personal sense of retirement. What are your expectations? What are your concerns? Then, with the help of MoneyGuidePro, our financial planning software, we gauge your goals and objectives in context of the assets you have accumulated as well as the income you will earn. Given various market conditions, the software calculates the probability of a successful outcome.

Accounting for the unexpected

Once we form the basic outline of your retirement, we take you through a variety of “what if” scenarios to improve your probability of success. We can also “stress test” your projections by modifying variables like investment returns, inflation, Social Security, and unexpected healthcare expenses. As a result, you will know what adjustments to make to have the best possible retirement.

Once your retirement planning model is developed, it can be easily updated to reflect changes in the market, your investments, or other aspects of your financial life.



Call Seth or Brian anytime to discuss planning for your retirement.



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Important Disclosure Information

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