

ANSWERS TO YOUR TOUGHEST FINANCIAL PLANNING and RETIREMENT PLANNING CHALLENGES

**You've Worked, You've Saved, You've
Sacrificed, Eventually you will retire...**

**Do You Have a Clear Plan to Guarantee
Success, *Or Are You Worried?***

You've saved and accumulated a substantial amount of assets for one main purpose – to have a wonderful and successful retirement, free of the stress and anxiety about money. Whether you are retired or soon-to-be-retired, or retirement is in sight the most crucial time to make the best decisions about your money, and avoid mistakes, is right now!

The key is to understand that you are retired, or soon or eventually will be, and you must position your assets and create a plan based on the facts that you are no longer making a salary, no longer adding to your retirement funds, and no longer can tolerate large losses. Your assets must work for you now, and all throughout your retirement.

Sure, retirement for most can be overwhelming, with so many decisions to make, knowing one bad move could potentially ruin your future. So, while you may worry, and are afraid you may run out of money, you can eliminate your fears with a proper plan. It will take a little time and effort on your part.

We know many retirees have trouble sleeping at night because of how much they worry about their money. We have found their worries and sleeplessness comes from not having a true plan and thus not understanding their money. They fear what they don't understand.

That's why we help clients by creating a Comprehensive Written Financial and Retirement Income Plan that is focused on answering all of the questions that keep them up at night.