



Retirees

- You have accumulated savings through years of hard work.
- Your primary goal is to ensure a comfortable, sustainable and enjoyable retirement doing the things you love.
- Good health and longevity is a priority.
- You are looking for guidance on how to pass on your wealth efficiently and leave a legacy.
- You have \$1 million plus in investable assets.

Recommendations:

- Create an in-depth wealth plan that includes cash flow projections that will provide you with a secure retirement.
- Work with your lawyer and accountant to create a sound estate and legacy strategy that will minimize taxes and ensure your wishes are carried out accordingly

Results:

- Increased confidence and peace of mind, knowing that you're on track to achieving your retirement goals
- Your investment portfolios are diversified and aligned with your risk tolerance and investment objectives.