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Preparing for Retirement

We enjoy working with couples who are preparing for retirement, who are committed to improving their lifestyle and wealth.

You've worked a lifetime, raised a family, built a career; planning for a successful retirement should be easy. While preparing for retirement might seem like an easy task, it's not. It's different for everyone even though the media has tried to define it for us. Did you know the concept of 'retirement' has only existed within the past 100 years? The idea of 'retirement' was introduced by what is now known as the financial services industry. No one really knows what retirement will actually be like until they experience it. Have you asked yourself...?

- What will 'retirement' be for me?
- What 'legacy' do I want to leave my children?
- How can I help ensure my parents age with grace, dignity and comfort?
- How will I manage the transition from career to retirement?
- How do I protect my family and my life from the unexpected?
- Will I have more life than money?
- Which asset do I use first?

As your Financial Architect, we work with you to define your vision for retirement and help you prepare for it as best you can. We'll help you plan for the expected and the unexpected transitions that you'll face in retirement.

We ask the hard questions, questions that will get you thinking about the important things in your life; your dreams, values and goals. We'll help you discover and define what retirement means to you. Regrettably, few financial professionals ask the hard questions, few commit to a comprehensive client centered process.

With proper planning, we'll help ensure...

- your lifestyle is protected
- you don't outlive your money
- you and your parents age with dignity and grace
- you maximize your cash flow
- you utilize assets in the most efficient manner
- your wealth is preserved and protected
- you create a living and lasting legacy that will live on with your kids and community
- your wishes are properly documented 

