

MOVING CLOSE TO RETIREMENT

You may find yourself asking why the last 5 years before retirement are critical? For many people, retirement has always seemed like a far-off goal. The last 5 years before retirement are often seen as critical because it is a time to solidify your retirement plans, adjust investment strategies to be more conservative, and ensure that you have adequate savings to support your retirement lifestyle. When you are in your twenties, thirties, or forties, retirement may feel like something you don't need to consider right now, but having a plan in place will help immeasurably.

Flash forward to your late fifties or early sixties, and seemingly overnight, you begin to pay closer attention to anything related to retirement planning. You may ask yourself the following questions with greater urgency each day. Have I saved enough for retirement? Are my retirement accounts invested in the best way for my future? How will I pay for long-term care? Do I need a trust? Should I pay off my mortgage?

Consider joining us for a discovery meeting and a second opinion. A meet and greet with an Advisor should be rewarding and that is what we guarantee! Come meet us! We provide impartial advice, paid parking and a great cup of coffee!

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Please contact us to set up a meeting to learn more.

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