

HLS Retirement Consulting



HEATHER SCHREIBER

Advanced Markets



Contact Us.

Meet with us at one of our multiple office locations
Email or call to schedule your appointment

Allegiant Financial Services Group

Toll Free: 844-299-1501

Hours

Mon: 08:00 am – 06:00 pm
Tue: 08:00 am – 06:00 pm
Wed: 08:00 am – 06:00 pm
Thu: 08:00 am – 06:00 pm
Fri: 08:00 am – 06:00 pm
Sat: By Appointment
Sun: Closed

Meet Heather Schreiber

Heather Schreiber, RICP is the founder of HLS Retirement Consulting, LLC and partners with financial, legal, and tax professionals to build holistic client solutions for retirement. Her goal is to help build customized solutions for by incorporating advanced planning strategies that unique to a client needs and in easy-to-understand and deliverable terms. Heather's passion for consumer advocacy and education is the driver of her success.

Her career highlights include the following:

- Over 25 years in the financial services industry
- Writer, speaker, trainer, radio, seminars
- Creator of Social Security Advisor, a monthly newsletter
- Frequent IRA guest expert in Ed Slott's IRA Advisor
- Frequent guest speaker for Ed Slott's Master Elite Advisor Group
- National Social Security Advisor® certificate holder
- As seen in Retirement Daily, Forbes and USA Today
- Strategic Educational Partner with National Association of Fixed Annuities (NAFA)
- Continuing Education instructor Surgent McCoy, CPE
- All Star Tax Series Panelist sponsored by Edward Jones

Areas of Expertise

- ✦ Retirement income planning/case design
- ✦ IRA distribution strategies
- ✦ Social Security strategies and how to cater the claiming decision unique to a client's goals and needs
- ✦ Tax mitigation techniques in retirement
- ✦ Qualified retirement plan design and compliance
- ✦ Tax law reform and compliance
- ✦ Legacy planning and beneficiary considerations
- ✦ Non-qualified annuity structure and taxation
- ✦ Trust planning
- ✦ Charitable giving
- ✦ IRS reporting and corrective process

