

Use this retirement timeline to help determine the ages you should pay special attention to. It's a helpful tool to use as you develop a retirement income strategy with an insurance professional.



# Ready for Retirement?

Retirement—it's what you work your whole life for. While everyone will have their unique ideas for retirement (travel, spend time with family, a second career), there are some common challenges the next generation of retirees face.

These include longer life expectancies, inflation, market volatility, and taxes, all of which can make the prospect of a sustainable retirement difficult. And what if you have other goals, such as passing on a legacy to the next generation?

Our biggest goal is to help position our clients toward their ideal retirement and address the challenges they may face. We do this by building plans that address their specific needs and unique objectives.

We recognize how important retirement is for you. Whether you are just now saving, about to retire, or already in retirement, we have the solutions and experience to help you.



## Our Keep-It-Simple Approach

*Arrange your assets to last longer than you*



*Position retirement resources for an efficient tax treatment*



*Identify efficient wealth transfer strategies*

