

# Benefits of Retirement Planning

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Retirement planning is the process of evaluating your current financial standing and creating a strategy for helping you achieve your desired retirement lifestyle. It's about matching goals with financial realities, with a focus on providing a lifetime of income after your last paycheck.



Because an individual's retirement years can span decades, retirement planning generally dominates other financial goals. A successful plan put in place during your working years should address ways to help maximize growth and prepare for tax-efficient distributions.

We will simultaneously develop a plan for growing your wealth and a plan for drawing on your wealth. Planning for retirement also involves risk management. Other topics, such as IRA rollovers, employer-sponsored plans, and executive compensation, may come up during our discussions as well.

A good retirement plan will be well coordinated with your overall plans for your investments, business, estate, and taxation and insurance needs.