



## ***Complimentary Consultation, Retirement Review and Financial Planning!***

Our firm specializes in helping individuals develop sound retirement strategies. If you are retired – or approaching retirement – please take the time to explore our website and the wealth of information we offer. We offer personalized, hands-on service. We educate our clients about financial concepts, products, and take the mystery out of investing, insurance, estate conservation, and preserving wealth.

We understand the many challenges of retirement today and know the biggest concern for many is outliving their money. We focus on money management, as well as other issues that are critical to your financial well-being.

### ***Financial Planning***

Pension Analysis  
Workplace Retirement  
Deferred Comp/ 457(b) Planning  
Retirement Plans  
403(b) Planning  
College Plans  
Estate Plans

### ***Investments***

Tax Managed Investments  
Brokerage Accounts  
Fixed Products  
Bonds  
Common Stock  
Educational IRA  
Traditional IRA  
Roth IRA  
SEP IRA  
Simple IRA  
Annuities

### ***Insurance***

Disability Income Insurance  
Life Insurance  
Long-Term-Care Insurance  
Aflac

### ***Contact us for a Complimentary Consultation***

Office: 631-601-1660

Website: [www.Jbgreco.company](http://www.Jbgreco.company)

Email: [katherine@planningsolutions.company](mailto:katherine@planningsolutions.company)



**500 Express Drive South, Brentwood NY 11717**

Securities offered through LPL Financial, Member FINRA / SIPC