



Health and Wealth

Retiring on Your Own Terms

As you approach retirement, your goal is to achieve financial health and well-being throughout the coming years. Working continuously with your team on decisions about when to stop working, when to collect Social Security, and how much income you will need throughout retirement will help you envision what your retirement will look like, on your terms.

Your team can assist with:

Social Security Benefits

What are the benefits available to you? Have you recently been divorced or widowed? Reviewing the options available to you will help maximize the payments you will receive and/or uncover that you may need additional income sources to maintain your current lifestyle in retirement.

Evaluating Healthcare Options

Healthcare costs can be one of the largest expenses you will face in retirement, and working with your team to evaluate your options from private insurance to Medicare and Medigap will help prepare you for whatever the future may hold.

Supplemental Income

Should you need additional income in retirement, annuities can provide a guaranteed stream of income to supplement Social Security benefits, help cover health care costs and/or a long-term care event.

Gathering Important Documents

Locating all of your documents and organizing them in one location can be essential when settling your estate. It will make the emotional journey a little easier for those you love. Creating a list of sentimental items and designating them will avoid any unforeseen conflict among family members and friends, it will ensure your assets are distributed as you had intended.



Please contact us with questions:

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