

# Secure Your Financial Future:

## *Guidance for Life's Next Chapter*



**Life's major milestones often bring significant financial decisions. Whether you're downsizing, planning for long-term care, or considering a move to a senior living community, expert guidance is essential.**

**Let us help you navigate the financial aspects of this important life transition.**

We understand that planning for the future can be a daunting task, and the unique financial challenges faced by seniors. We can help you create a comprehensive plan that aims to address your financial and personal needs.

***Our services include:***

- Assessing your financial picture, including your income needs
- Creating a long-term plan that outlines your goals and objectives for the future
- Protecting your assets from potential risks
- Exploring long-term care options and costs
- Facilitating family meetings to discuss important decisions

### **About The Montanez Group**

The Montanez Group of Oppenheimer & Co. Inc. is led by Clara Montanez, Executive Director of Investments. She is supported by a dedicated team of financial advisors, long-term care and insurance experts, estate planning professionals, and financial planners.

Our team understands the importance of intergenerational planning to preserve and grow wealth. With more than 30 years of industry experience, we remain dedicated to personalized service for our clients and their families.

From saving for children's education, to securing a first home, to retirement planning and enjoying the golden years, and to ultimately preparing your legacy, our team offers comprehensive counsel to ensure each milestone happens smoothly.

***Your financial future deserves attention. Schedule a complementary consultation today.***

### **Clara Montanez**

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