

FUNDING RETIREMENT



PLANNING WITH PURPOSE

Retirement brings exciting possibilities and important financial decisions. Some are expected, like when to start drawing Social Security. Others can be more nuanced, like how to balance tax efficiency with long-term goals.

Together, we'll explore key questions such as:

- **SOCIAL SECURITY**
When and how should you begin receiving benefits?
- **SAVINGS VEHICLES**
Which retirement accounts (401(k), 403(b), SEP IRA, Roth IRA) support your overall strategy?
- **DISTRIBUTIONS**
What are potential strategies to draw from your accounts over time?

Want to see how we bring this to life?

Ask your advisor for an example report.



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