



2021 financial checkup

Get personal attention for your retirement questions

Taking control of your finances starts with an honest conversation with experienced industry professionals. That's why we're offering exclusive, personal consultations during the week of January 11 – 15 to address questions about retirement, such as:

- Can I afford to retire?
- How do I invest in income vs. growth?
- Are my investments too risky for the current market conditions?
- When should I start my Social Security?
- What should I do with my 401(k)?
- How much will health insurance cost me?
- Should I be concerned about long-term care insurance?
- Are my beneficiaries set up correctly?
- Do I need a will or a trust?
- What impact will the election results have on my portfolio?

We can meet with you over the phone, virtually or in person with COVID-19 precautions in place. We'll miss the group workshop at the Bobbing Bobber Brewery, but we have a special gift for you as a memento. Give us a call today to schedule your financial review.

Hosted by

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