

Retiree Prosperity Projects

Nine projects to prioritize your key financial decisions as you enter and navigate retirement

Plug the Holes in the Boat

The first project focuses on emergency preparedness and risk management. You will learn how to create an emergency fund, address major life uncertainties with appropriate insurance, and pay down high-interest debt.

01

Income Planning

In this project, we will build a plan with you to meet your cash flow needs as you enter and progress through retirement.

02

03

Retiree Marginal Tax Bracket Management

In this project, we will work with you to build and execute a strategy designed to optimize when you take income and from which accounts.

04

Investment Planning

In this project, we will strategically invest your money to align with your goals, simplify your financial life, and develop tailored withdrawal plans for each account.

05

Estate Planning

This project will help you ensure your family relationships stay strong and that your wishes are carried out if you die or become disabled.

06

Manage Reasonable Debt

This project will guide you through the process of prioritizing and paying down debt, including evaluating whether to pay off your mortgage.

07

Advanced Tax Optimization

In this project, we will explore innovative strategies aimed at optimizing your tax plan.

08

Advanced Insurance

The goal of this project is to assess and optimize your insurance coverage and needs, including ACA, Medicare, and decisions about starting, reviewing, or discontinuing life insurance.

09

Advanced Estate Planning

In this project, we will address more complex estate matters, including taxes, intricate trusts, and final expense management.