

What is GuidedChoice?

GuidedChoice helps you take a more confident approach to retirement planning with personalized advice designed around your goals. Whether you're just starting to save, refining your investment strategy, preparing for retirement, or already in retirement, GuidedChoice provides professional objective advice, ongoing portfolio support, and clear recommendations to help you make the most of your workplace retirement plan.

Why GuidedChoice?

No fee for guidance (fees apply only for managed account services)

We do not have custody or take possession of your assets

We work for you—not with commission-based incentives or product sales

Saving For Retirement

Working toward the life you want

- See all your retirement accounts in one place
- Get a personalized investment plan
- Adjust assumptions to see impact
- Know how much to save
- Understand impact of funding other goals

Key Questions We Can Answer:

- Am I saving enough?
- When can I retire?
- How do I balance other goals?

Already Retired?

Or within 3 years of retiring

- Get updated withdrawal advice each year
- Know which accounts to use first
- Plan Social Security timing
- Make tax-smart withdrawal decisions
- Turn savings into income and make it last

Key Questions We Can Answer:

- How much can I withdraw this year?
- Would an annuity make sense for me?
- Will my savings support me through retirement?

Log in or create your account

Set up a free, no obligation one-on-one to walk through the service.