

Retirement Planning

Regardless of where you are in your career, the decisions you make today will have a direct impact on your lifestyle after you retire. Developing a comprehensive retirement plan and implementing that plan effectively will help you ensure your family's comfort and security later in life.

While it's preferable to plan for retirement in the early years of your career, it's never too late to put a plan into place for retirement, wealth planning, or business transition. Proper planning will help you achieve all of your goals, from providing long-term financial security for your family, to benefiting specific causes, to paving the way for business transition of a family business.

At Cassidy Schiller we work closely with our clients to understand their values. Each project starts with an in-depth conversation about your specific situation, objectives, and plans. Once we understand your personal and family goals, we work together to develop a plan that will allow you to move with confidence towards your desired retirement. We work closely with you to ensure that your personal plan is comprehensive and addresses all concerns, including making sure you are taking every advantage of tax-deferred savings plans and protecting your investments against inflation.

Our retirement planning services focus on tax minimization in order to maximizing family revenue streams during retirement through tax efficient asset management.

Our retirement planning services include:

- In depth discussion of your financial foals
- Projection of the value of your potential estate
- Analysis of your employer retirement plan and related benefits
- Development of a detailed plan
- Tax efficient review of asset allocation
- Implementation of your plan by working with your attorney and other professionals

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