

Retiring Soon? Your Guide to Planning Ahead

Retirement can be a rewarding phase of life, filled with new opportunities and experiences. However, effective planning is essential to ensure your financial security during this time.

As Americans live longer, healthier lives, it's crucial to prepare for the financial demands of a longer retirement. To ensure you stay on track, it's important that you develop a personalized retirement roadmap and begin planning early. Watch as we discuss:

- 3 pillars of retirement income: pension, Social Security, and personal savings
- Which accounts can provide tax-free income?
- Closing the gap between retirement income and lifestyle expenses
- Mitigating the impact of Medicare costs

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