Financial Wellness

Creating A Personal Plan For Your Retirement

At Voyage, working with you and your loved ones to create a personalized financial plan is the core of our comprehensive retirement planning process — and it is provided to you at no cost or obligation.

It's part of the Voyage Team's commitment and willingness to invest our time and energy into your financial wellness and retirement preparedness … and to begin a long-term relationship.

Our planning process will help you answer the two most pressing questions regarding retirement:

- *How much money do I need to retire?*
- *Is that money likely to last my lifetime?*

Our approach begins with a one-on-one discussion regarding the goals and objectives you have for your retirement. How do you want to live in your retirement years and what do you want to accomplish?

We'll delve into your retirement benefits as well as other critical retirement topics such as:

- *Wealth Management*
  - *IRAs*
  - *401k*
  - *Pensions*
  - *Assets*
- *Retiree Health Care*
- *Long-Term Care*
- *Social Security*
- *Tax Strategies*
- *Estate Planning*
- *Family & Charitable Considerations*

The end result is that - sooner than later - you will have a detailed plan of action to consider for your retirement.

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