

Achieving Financial Wellness without Unnecessary Risk

Don't Get Fooled Again

It's a fact: average life spans are significantly longer than they used to be.

While this is undoubtedly a good thing, it does mean that the amount you'll need to save to ensure a comfortable retirement is substantially more than required by previous generations. As well, given the heated debate over raising the U.S. debt ceiling and continued funding of Social Security, it's possible that future payments may be affected. And though we can all hope that the inflation rate will return to a more manageable level, there are reasons to think that the cost of living could continue to increase faster than incomes.

Such realities make saving and budgeting ever more important because your decisions in the days ahead will not only have important consequences on your retirement savings but also on your tax bill.

You don't want any more time to zoom by without thinking carefully about how to maximize your finances. Let's talk to make sure you make the right decisions for you and your family.

Thanks,

Margaret & Henry



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Schedule a Meeting



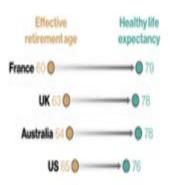
Older Workers Are Fooling Themselves When It Comes to Work, Money, and Caregiving

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When asked how much they agree with the statement, "I am confident that I will have enough money...

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