Retirees

You may be wondering how far your savings will take you and what your options are. We have answers.

Now that retirement is closer,

let's talk about ways to make your money go further.

Everyone's vision of retirement is unique.

The transition to retirement and the accompanying move from "saver" to "spender" can cause anyone anxiety. You're likely asking questions such as:

- "Can I afford to retire and remain financially independent?"
- "How much can I safely withdraw from my investment accounts without running the risk of running out of money?"
- "How exactly do I get money out of these accounts?" and
- "When should I take Social Security benefits?"

There are many questions that pop up when thinking about retirement. From healthcare expenses to applying for Social Security benefits, there will be times you will want to consult with a Bridgeworth advisor. The founding partners of Bridgeworth have more than 30 years of planning experience, and we have helped thousands of clients retire. Your advisor will take the time to answer all of your questions in a manner that is straightforward and as jargon-free as possible.

A retirement plan is not a "set-it-and-forget-it" kind of thing. Things change. There are market shifts, changes in tax laws, and changes in your own life that could have an impact on your plan. These realities need to be assessed by a Bridgeworth CFP® retirement-planning professional to see what, if any, post-retirement strategies should be incorporated into your plan.

One of the primary goals in providing you with informed and thoroughly researched answers to your questions is so that you can worry less about money and enjoy more of life.

ONE-SIZE-FITS-NONE™

You are the only "you" there is. Your financial plan has to be as unique as your fingerprint.

VALUABLE OBJECTIVITY

Your financial advisor can also be a good sounding board to help you remain objective and reality-based about any major spending you may be considering, before or during retirement. Having a trusted and objective "voice of reason" can help you stay on track.

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This is a team sport. In order to provide you with the best available insights, your advisor is constantly drawing on Bridgeworth's extensive wealth of knowledge and financial planning resources.

As the conversation continues, you will make all of your financial decisions. Our role as your financial advisor is to keep you focused and informed on the choices available to you so that you understand how every financial choice you make impacts your goals.

FINANCIAL PERSONAL TRAINERS

To put it plainly, our role is to listen to you to understand what you want your future to look like, and then, coach you all the way there. In fact, that is the best way to think about our role. We are personal trainers who encourage and coach you into a better financial future.

Call us and let's begin a conversation.

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