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Senior Planning Advisors in the Media:

SENIOR PLANNING ADVISORS

Is it time for you to turn the page and begin planning for the next chapter of your life? Let us help you prepare for your financial future.

Senior Planning Advisors has been working with friends and neighbors for more than 17 years to help meet their financial goals. If there is one thing we have learned from the past decade is that the more information a person has, the more likely they are to make sound decisions in retirement. Knowledge is power. That is why Senior Planning Advisors began teaching classes in conjunction with Strategic Investment Advisors and an estate planning attorney at University of Michigan and Eastern Michigan University related to all aspects of retirement including, financial concerns, investment strategies, income planning, health care planning, and estate planning.

Strategic Investment Advisors is our Registered Investment Advisory Firm. We are independent advisors that are beholden only to our clients. We do not answer to any shareholders or executive management; we are not captive to any company or corporation. Our success is solely derived from putting our client's needs first, period.

We are all very quick to forget the past, especially the painful ups and downs that come with market corrections. While we can't predict what will occur in the market, we can utilize a variety of strategies that helps reduce the risks that come

Meet Kirk Cassidy

Kirk Cassidy is the president of Senior Planning Advisors and Strategic Investment Advisors. He is a fiduciary who holds a Series 65 securities license, as well as a life insurance license in Michigan and many other states. In addition, Kirk is an advisory board member for a $6.5 billion institutional money management firm. Over the years, Kirk has helped hundreds of people all over the country retire with a comprehensive retirement plan that best fits their needs. He believes that proper tax

with significant market fluctuations. This is not just accomplished by buying products or mutual funds; it's about having a plan. At Strategic Investment Advisors, we believe that as fiduciaries, we can't just talk about planning, you have to DO planning. That means creating a roadmap that addresses tax planning, wealth management, estate planning, charitable planning and social security planning. This is not your typical approach that you will find with many advisors. While many claim to be fiduciaries, many advisors are salesman just selling product without a plan. And if you are looking to large wire house brokerage firms to advise you, you may want to think again. Typically, what you will get from these financial big box firms is high pressured sales and costly products. What differentiates us from others is that prior to making any decision on a product or investment, we spend 30-50 hours evaluating and designing a customized plan. We will meet at least five times through the initial planning process. The planning process begins with us learning about your priorities including your goals, objectives, and concerns. Following the development and implementation of your plan, we will regularly meet to review your plan and evaluate opportunities for improvement. Our strategic relationships with CPA's and attorneys help us create this holistic plan that addresses all aspects of retirement needs.

We are happy to meet with you whenever is most convenient for you. To schedule a time to discuss your financial future and design a retirement plan, contact us at retire@seniorplanningadvisors.com, or call us at (866) 211-1904 today!

Listen to Inside Retirement Radio with Kirk Cassidy on WWJ 950 Newsradio.

planning can help increase asset performance in retirement without taking on greater risk. As a result, he developed an asset allocation model that provides clients with a roadmap to help preserve and distribute financial assets, while also helping to increase their wealth.

LEARN MORE ABOUT KIRK

Meet Paul Metler

Paul Metler is the co-president of Senior Planning Advisors – Ann Arbor, and is an Investment Advisor Representative for Strategic Investment Advisors. He holds a Master of Business Administration degree from the Ross School of Business, University of Michigan, and has 20 years of experience in clinical, academic, administrative and executive leadership positions in public and private health care systems.

LEARN MORE ABOUT PAUL

COMPLIMENTARY GUIDE:

Your Key to a Secure Retirement

Request our free guide, Your Key to a Secure Retirement, and learn how we can help you prepare for the days ahead.

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