How We Help You
RETIREMENT PLANNING

GET STARTED ON THE RIGHT COURSE

"I am an explorer and guide in the world of personal financial issues, a person who wants to learn about and really understand people and their challenges and offer solutions. Clients need a navigator who has traveled and explored and found both new and successful ideas, while avoiding the risks and dangers of staying in the wrong financial place."

WHO WE ARE

Before GPS and the internet, I set off with a backpack and a one-way ticket to London, my door to the rest of the world. My two-year journey took me through Europe, North Africa, the Middle East, and South Asia, using public ground transportation when it was easier to stay alive in those places, but still full of risks. Later, in my corporate career, I was sent to many other countries due to my experience and ability to deal with the uncertainties and challenges of different cultures. So far, I have visited or lived in 41 countries. These valuable early experiences were key to my later work in the sometimes confusing world of financial planning.

There is a similarity between my travels and my work in what, to many people, seems lil unknown and risky territory–the world financial risk management and retirement planning. I approach my work with the same seriousness and thoroughness as I did in my travels when my life was sometimes at stake. I view myself now as a sort of “financial travel guide,” helping my clients navigate, protect and enhance their financial lives.

During my travels I had to learn to identify, manage and avoid many types of risks, such as weather, robbery, physical danger, and changing political and social landscapes. I had to research in advance, cross-check my findings, discuss and share best ideas with fellow travelers, and become familiar and comfortable with different people, cultures and ideas. I had to create different routes to the same destination, sometimes stopping and waiting out uncertainty, and then deciding the best course of action from all these inputs. *I learned to pay attention to what worked*.

It is very similar to my financial and retirement planning work today. I take an evidence-based approach to financial planning. I help my clients sift through competing and contradictory financial claims and beliefs, and adopt solutions that have been proven to work with high probabilities to increase the odds of reaching long-term financial and life goals.

JIM VAN METER

Certified Financial Planner™

Jim Van Meter is a Certified Financial Planner™ serving clients in Nevada and California. He attended the University of California, Berkeley, did honors work in both Engineering and Psychology, graduated Phi Beta Kappa, and returned for his MBA in Finance. He has held financial positions in tax accounting, mortgage lending, and banking, as well as engineering and management positions in large and small firms, such as IBM, Oracle and Sybase. He left the corporate world to pursue personal financial planning and focuses on issues of concern to current and near-term retirees, as well as those who want to lower their financial risks. Jim and his wife, Michaelle, live in Reno. He still loves to travel.

FINANCIAL MYTHS

There are many financial myths, outdated ideas and approaches that do not stand up to real world or current economic conditions. I confer regularly with colleagues and monitor new and emerging solutions constantly. I put all this together to help you have a successful financial journey. I focus on helping you attain the following outcomes:

- Make your money last for life, with increasing income, and with protection against inflation risks
- Lower your taxes

- Invest with money managers who have beaten their market benchmarks, and who have avoided large drops that destroy long-term returns
- Make optimal Social Security claiming decisions for your specific circumstances
- Protect you and your family's wealth from disastrous long-term-care expenses
- Identify and educate you about possible errors in beliefs that could lead you into financial trouble
- And ultimately, help you attain financial peace of mind

Retirement planning can be complex and confusing like traveling in a strange land. Many financial decisions interact with each other, and I evaluate and balance potential solutions to seek to attain the best path forward to success.

Retirement Planning

The earlier and more carefully you plan, the more likely you are to realize your vision of the future and enjoy yourself when retirement actually comes. We can guide you step-by-step through the retirement planning process and help you create a plan that meets your unique goals and objectives. Already have a plan? We test retirement plans, so just ask us to review yours.

Contact us now!

Lifetime Income

Protecting your hard-earned assets in perhaps the most volatile era in generations can be easier than you think. And there may not be a more important time than now to safeguard all that you've worked so hard to achieve. Integrating fixed-index annuities and risk-managed investments into your portfolio can help protect you from market loss during a downturn while giving you the opportunity to realize market gains during the good times.

Contact us now!

Tax-Advantaged Retirement Planning

There are many new investment options which can offer amazing tax advantages to retirees. Some of the strategies we utilize offer ways to withdraw or borrow "tax-free" or provide additional tax deferral and favorable tax rates for certain people depending on their individual tax situation. Let's discuss this!

Contact us now!

Investment Management

Most people work their whole lives accumulating assets they will need in their retirement years. When planning for retirement, the focus shifts from asset accumulation to asset protection and preservation. We have several strategies that address your changing investment needs.

Contact us now!

Long-Term Care

Long-term care can be expensive. Paying for long-term care out of your pocket can eat a huge chunk out of your nest egg. Without a strategy to protect yourself, you could be facing unexpected costs without a plan to pay for them. Ask us about the new solutions that improve on [illegible]

Contact us now!

Insurance Strategies

Insurance has changed drastically in the last decade. Insurance policy innovations can bring more than just financial protection for your family, they now offer the opportunity for lifetime monthly income, disability coverage and long-term care coverage options through the use of special policy riders.

Contact us now!

EVENTS

Look for our popular workshops to be scheduled soon:

We don’t have any events scheduled at this time, but check back soon!

- Retirement Planning Workshops
- Optimizing your Social Security Decisions
- Protecting your Wealth with modern solutions for Long Term Care

... and more.

CONTACT INFO

TAHOE FINANCIAL PLANNING

4741 Caughlin Parkway, Ste. 2

Reno, NV 89519

775-851-2345

info@tahoefp.com

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