

Planning to retire in the next 5-10 years?

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WE KNOW YOU

You have a lot
You may want to spend more time with
worr
You want to retire knowi

But this is going through your head:

- When is the right time to step away from work?
- Will my portfolio provide enough income over my lifetime?
- How do I plan for social security, pension income and withdrawals from my investments?
- Will I survive a market downturn in retirement?

These are difficult questions and you know you can't answer them alone. We help people like you!

As independent financial advisors in Kentucky and Ohio, we work with people who are within 5-10 years of retirement. You may have worked with other advisors in the past, but have you worked with a planner? We're planners--but not the kind that just plug your numbers into a worksheet and forget about you. We'll work closely with you to figure out what income you'll need and how to generate that income from your investments, social security benefits, pension benefits and other income sources in a sustainable way that feels good to you.

When it comes to your investments, we know that **you want to protect what you've saved and see it grow too!** We're dedicated to making that happen. And we'll help you create an investment strategy to do just that.

LEARN MORE

Join us for our next workshop!

Will I Have Enough

How to Calculate Your Retirement Needs in 5 Steps

There are a lot of retirement calculators and planners out there, but how much do you really need for retirement, and how much do you really need to save? Darren Wurz will show you how to estimate your retirement goal, and share the biggest retirement planning mistakes to avoid.

This free event will take place at 200 West F Street, Louisville, KY. Refreshments will be provided. If you want to take control of your golden years and be part of the 17% of Americans who are financially independent, space is limited, so register today!

Date: Thursday, June 13th

Time: 5:30-6:30pm

Location: 200 West Pike Street, Suite 100, Covington, KY 41011

Register Now!

Join us at our next free webinar: *How Much Do I Need to Retire?*

Do you worry about having enough money to retire? Do you worry about your money lasting throughout retirement?

There are a lot of retirement calculators and retirement. But how much do YOU need bas

Join me for this 1-hour workshop, where I will be able to retire in *4 simple steps*.

In this webinar, you will learn:

- How to forecast your future expenses (
- How to calculate how much money you
- How to determine if you are on track to

Register Now!

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