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We are living longer.  
Our money should too.

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Effectively managing and  
investing money is difficult.  
We are here to help.



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# We aim to make it easier to extend the

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## life of your money.

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### Customized Financial Planning

We tailor your financial and investment plan to your specific needs and goals, providing guidance on everything from when to claim Social Security to potential future spending needs.

### Sophisticated Investment Strategy

Our investing strategy uses new technology that aims to address your unique needs and dreams, while managing risk and minimizing taxes – and all while keeping costs substantially lower than the market average.

### Day-to-Day Management

We monitor your financial plan, initiate withdrawals to cover your expenses, handle required minimum distributions, and generally help ensure that you are on track.



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HI, ANDREW! IT'S SUNNY IN ARLINGTON TODAY. TEMPERATURES WILL RANGE FROM 68 TO 71 DEGREES.

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You have a very high chance of reaching 6 of 9 spending goals.

This plan will reach 6 of your 9 spending goals in 99 percent of the future potential market and life events we considered.

[View My Plan](#)



### This Month, You Need To:

### Advisor Info

• Transfer Roth IRA into your United Income account

• Transfer Etrade into your United Income account

• Transfer Emily's IRA into your United Income account

• Make a Withdrawal From Emily's IRA

Upgrade your membership to get access to our advisors and your own financial concierge team.

### Your Goals for This Month

1

**Essentials**

Monthly **\$5,101**  
End: Never

IN YOUR PLAN

2

**Lifestyle**

Monthly **\$3,524**  
End: Never

IN YOUR PLAN

3

**Healthcare Spending**

Monthly **\$260**  
End: Never

IN YOUR PLAN

Let's get started with some basic information.

(/) My name is First Name Last Name

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I was born on MM/DD/YYYY  
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[202 539 1039](tel:12025391039)

# Questions

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Support Team

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[members@unitedincome.com](mailto:members@unitedincome.com)

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[How do you define success?](mailto:members@unitedincome.com)

Media Inquiries

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[How do I get started?](#)

[\(mailto:press@unitedincome.com\)](mailto:press@unitedincome.com)

## What Others are Saying About Our Team

“ A Vanguard in Leading the Debate and Helping to Shape Solutions ”

Joe Mansueto, Founder, Chairman, and CEO of Morningstar



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