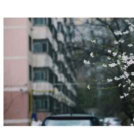
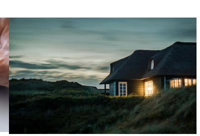
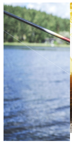
RETIREMENT PLANNING AND WEALTH MANAGEMENT

If you're retired or soon to be retired, now is the time to engage a firm that specializes in retirement planning and wealth management. Although our ideal client relationship begins in the years leading up to retirement, we can be of service at any stage of life. Contact us today to start the conversation.







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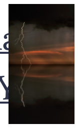

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The Difference In Comprehensive Financial Planning

Financial planning is a diverse field. It uses economics, finance, law, communication, psychology, and so much more to help promote balance, independence,…

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How to choose a Retirement Wealth Management Firm

WHY GOEPPER BURKHARDT?

When you're looking for a retirement planner, it may seem like every firm is the same. How do you know which one is right for you? There's not a single thing that makes us different from other wealth management firms in Greenville, SC. There are six.

We Are Retirement Specialists

We have developed expertise in the three integrated disciplines that are necessary to achieve retirement financial success: Investment Planning; Income & Spending Planning; and Estate & Legacy Planning.

We Are Independent

Unlike most bankers and brokers, we are free to offer the services that meet your needs rather than the needs of corporate shareholders and management.

We Are Fiduciaries

We are SEC Registered Investment Advisers. That means we're fiduciaries who are legally required to place your financial interests above our own.

We Are Process-Driven

Our proprietary process orchestrates and integrates the important financial pieces of the retirement puzzle.

We Are Fee-Only

We don't sell financial products nor do we earn commissions. The only thing we earn are the fees our clients pay us for giving them financial advice.

We Are Comprehensive

Wealth management is more than investment advice. It's also tax minimization, retirement planning, retirement income strategies, risk management, late-life care planning and estate planning. We take a comprehensive approach to helping you live well, now and for years to come.

LET US HELP YOU PLAN

We have developed expertise in the three integrated disciplines that are necessary to achieve retirement financial success.

Investment Plan

We'll tailor an investment plan that matches your risk tolerance — and exceeds your desired goals.

Learn More

Retirement Income & Spending Plan

How do you spend wisely and make the most of your retirement budget? We're here to help.

Learn More

Estate & Legacy Plan

It’s never too early to start preparing your legacy plan, and it all starts with a relaxed conversation.

Learn More

WHAT WILL YOU RETIRE TO?

Contact us to schedule a complimentary introductory appointment.

Contact Us