

# SAY HELLO TO SHP FINANCIAL



At SHP Financial, we believe everyone should be able to live the retirement they've always wanted. Our team of

professionals can help you create a well-thought-out strategy to help you address your financial needs and concerns.

We offer a wide range of financial planning and wealth management services focused on individuals who are in or nearing retirement age. From our main office in Plymouth MA, our fully staffed offices in Hyannis and Woburn, and our satellite offices in Braintree, Westborough, and Dartmouth, our goal is to help you manage your finances so you can pursue your goals.

Once we help develop your plan, we will not stop there. Now, begins the journey. We will be there to help you implement and manage your plan every step of the way for the rest of your life. Take the first step toward having the retirement you've always dreamed of!

[YOUR JOURNEY BEGINS HERE](#)

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# PROVIDING TOOLS FOR YOUR SUCCESS

Our passion is to provide everyone with that “sheltered harbor” for their financial freedom because it’s not about the money. It’s about being able to preserve the aspects of life that make it so special. And, our custom **Retirement Roadmap**<sup>®</sup> process can help get you to where you want to be in retirement!



## RADIO PODCAST & INTERVIEWS

Listen to the latest podcast, or archived audio, of our **Retirement Roadmap<sup>®</sup> Radio Show** airing every weekend on **WRKO, WBZ,** and **WXTK** radio. And, check out some of our latest interviews with local radio shows.

[Listen Now! >](#)



## TV APPEARANCES

At SHP Financial, we're honored and humbled to be regularly called upon by members of the media to provide our financial thoughts and opinions on various current news topics and share them with you.

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## UPCOMING WORKSHOPS

Focusing on common financial concerns individuals & families face in retirement, things like how to prepare for unexpected medical expenses & ways to create income to help support your desired lifestyle.

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## BOOKS

Writing original, thoughtful, relevant, and engaging content meant just for you.

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## USEFUL GUIDES

Providing you with complimentary downloads of some of our top financial insights.

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## PUBLISHED ARTICLES

Honored and humbled to be regularly called upon by members of the media to provide our thoughts and expertise.

**OUR GOAL IS TO HELP YOU MANAGE YOUR FINANCES SO YOU CAN PURSUE YOUR GOALS.**

**MEET OUR ALL-STARS**



## **THE SHP FINANCIAL RETIREMENT ROADMAP<sup>®</sup> PROCESS**

### **Step 1: Income Planning**

- We'll plan and help create strong and predictable income which is the foundation of a comfortable lifestyle.

**LEARN MORE ▶**

## Step 2: Investment Planning

- Our investment planning is based on a philosophy of controlling for volatility and eliminating unnecessary fees.

[LEARN MORE](#) ▶

## Step 3: Tax Planning

- We'll walk you through the numerous tax planning strategies that can minimize your taxes in a legal and ethical manner.

[LEARN MORE](#) ▶

## Step 4: Health Care Planning

- The costs of healthcare are rising and will be part of your life both pre-retirement and post-retirement. We'll plan for and address these costs.

[LEARN MORE](#) ▶

## Step 5: Legacy Planning

- Since we all will eventually pass, it is critical to have a plan to make sure that your hard-earned assets go to your loved ones and charities in the most efficient manner.

[LEARN MORE](#) ▶

**PROVIDING SHELTERED HARBOR  
PLANNING TO PLYMOUTH & BOSTON AREA**

**RETIREEES &  
PRE-RETIREEES FOR OVER 15 YEARS.**

**START YOUR RETIREMENT ROADMAP®  
JOURNEY TODAY**

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\*Guarantees provided by insurance products are backed by the claims-paying ability of the issuing carrier.

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