



## Protecting Your Wealth, Planning for Your Future

Rodgers & Associates financial advisers specialize in financial planning for investors who are retired or expect to retire within five years.

Today, individuals retire earlier and live longer than ever before. The new wisdom is to plan for thirty years of retirement. We work with clients to free them from their concern that they will outlive their assets.

Rodgers & Associates is independent and fee-only, so our only loyalty is to you.

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### Our Services Include

## RETIREMENT PLANNING

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Get personalized advice and guidance to help achieve your retirement goals.

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## ESTATE PLANNING

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Strategies to preserve the wealth you've worked so hard to build.

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# TAX-EFFICIENT STRATEGIES

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Keep more of your money with tax-efficient strategies.

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Receive Useful Retirement Planning Tips in Your Inbox Twice a Month

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## Latest Newsletters

### **A Special Purpose Entity Enables Individual Participation in PA's EITC Program**

June 27, 2019

Special purpose entities in PA allow individual donors to participate in tax credits previously only available to businesses.

### **How Qualified Charitable Distributions Can Impact Your Taxes and Favorite Charities**

June 13, 2019

Gifts through a Qualified Charitable Distribution can be one way to keep the tax benefits of a donation. Learn about the rules and benefits of QCDs.

[All Newsletters »](#)

## Latest Blog Posts

### **Under the Tax Cuts and Jobs Act, QCDs Can Be a Valuable Giving Tool**

By Patrick Carney, June 20, 2019



As a result of the Tax Cuts and Jobs Act, the vast majority of taxpayers began taking the increased Standard Deduction. Because of this, most taxpayers will no longer get a tax benefit from their charitable giving.

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### **10 Years Later: Lessons Learned from the Bernie Madoff Scandal**

By Patrick Carney, May 16, 2019



Since his deceit was revealed, there are still many unanswered questions. Despite these questions, there are lessons that fraud can teach all investors to avoid becoming victims of the next Madoff.

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### **Is Your Adviser Worthy of Your Trust?**

By Lee Pelko, April 18, 2019



It's not enough to connect with your financial adviser. Use these 10 questions to find a financial adviser you can trust with your finances.

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[All Blog Posts »](#)

## **Latest Updates**

### **Rick Rodgers' Podcast Interview**

Rick Rodgers was a guest on the Money Tree Podcast. He shared some information on long term tax strategies. You can listen to the interview [here](#).

### **Rick Rodgers is Guest on WITF Smart Talk**

Rick was a guest on the first WITF Radio Smart Talk program that aired on October 8<sup>th</sup> of 2008. Ten years later he participated in Smart Talk's anniversary broadcast to look back at the recession and the factors that had an impact on the recovery.



**AS SEEN ON TV**



Have you seen our advisers in the Project Wealth segments on WGAL TV 8? Each video focuses on an important financial topic and is designed to help people make smart decisions about wealth. [Click here to watch Project Wealth.](#)

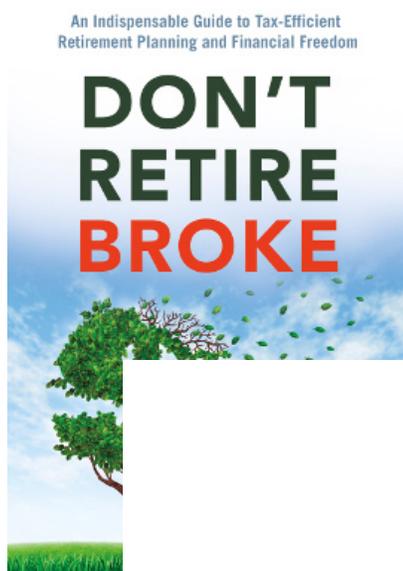


The Manor in Lancaster, Pennsylvania — home of Rodgers & Associates »

Rodgers & Associates is a wealth management firm located in Lancaster, PA. Our financial advisers offer fee-only financial planning to clients in the Central Pennsylvania area as well as across the country.

- As a Registered Investment Adviser (RIA)\*, we are held to a fiduciary responsibility, placing our clients' interests above all others.
- We believe that objective CERTIFIED FINANCIAL PLANNER™ professionals and members of the National Association of Personal Financial Advisors (NAPFA) represent their clients' best interests throughout the planning process.
- Our wealth management service extends beyond asset and investment management to include tax planning, charitable giving and estate planning, creating efficiencies wherever possible.
- Our team of financial planners follows our proprietary six-point process, WealthGuard™, as they work with you to help protect the wealth you've built.
- For each of our clients, we develop, follow, and maintain a written plan for financial independence and a worry-free retirement.

\*Registration as an investment adviser does not imply any level of skill or training.



### ***Don't Retire Broke:***

#### ***An Indispensable Guide to Tax-Efficient Retirement Planning and Financial Freedom***

Using easy-to-understand language and real-life examples, Rick teaches you how you can avoid savings pitfalls and costly tax mistakes —many you may not even know about—to help you enjoy the retirement lifestyle you want.

***Available Now***

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