specialists who offer the Perennial Income Model™.

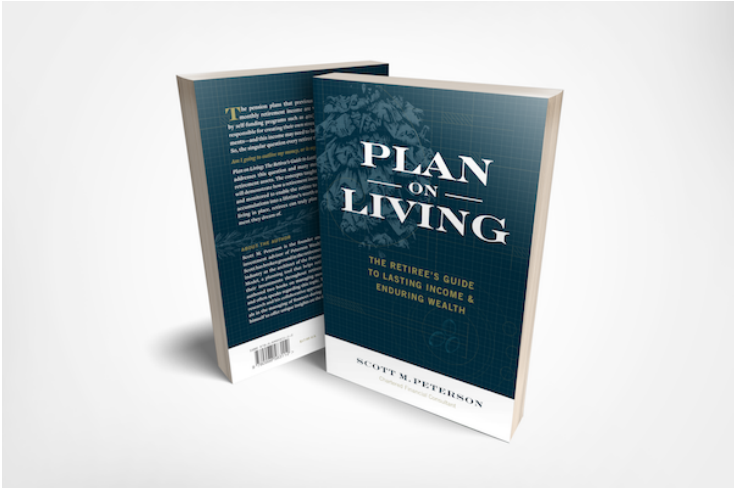
What is the Perennial Income Model?

Our Perennial Income Model matches the retiree's investments with their future income needs.

We literally wrote the book on retirement income maximization and are constantly looking for new and better ways to maximize retirement income for our clients.

03:01

The Perennial Income Model is a common sense, goal oriented approach to investment management that is designed to help retirees manage short term income needs as well give them an opportunity to keep up with inflation throughout retirement.



Request a copy of our new book!

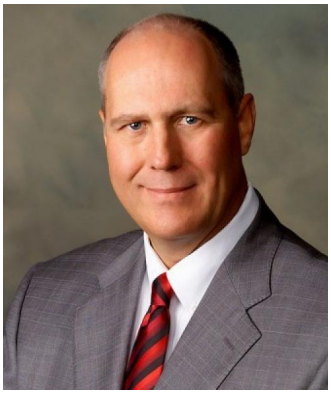
Am I going to outlive my money, or is my money going to outlive me?

Plan on Living: The Retiree's Guide to Lasting Income and Enduring Wealth addresses this question and many more about the management of retirement assets. The concepts t pages of this book will demonstr

income plan should be constructed and monitored to enable the retiree to transition a career' worth of accumulations into a lifetime's worth of income.

REQUEST A COPY OF OUR NEW BOOK!

Advisory Team



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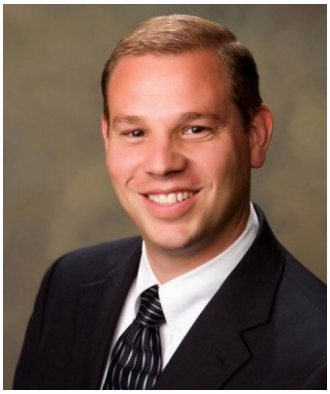
FOUNDER,



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ABOUT US

As retirement scholars, we recognize and implement tried and true methods of investing, but are constantly investigating new and better ways to maximize retirement income.

We create trusted, long-term relationships with our clients and their families, and help them navigate the different stages of retirement by providing sound financial advice and expertise.

FINANCIAL PLANNER™, CFP® (with plaque design) and CFP® (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.