

CLIENT



SECURE YOUR FINANCIAL FUTURE

Retirement is not what it used to be. You may want to keep working, or volunteer more. Maybe you want to start a business, or even go back to school. In the next phase of your life, you may want to spend more time with your grandchildren – or travel the world. No matter what future you want to design, you want to feel secure about it. Let us help you plan for that future.

Who We Help

If you're nearing traditional retirement age and you want to plan wisely for what's coming next, we can help.

How We Help

We carefully consider what matters most to you and deliver a plan to make that happen.

Take the First Step

Are you ready to put your plan in place for the next stage of your life? Schedule an introductory call.

401k Services

Are you an employer who wants to improve or outsource your 401k plan? Let's review it.

Meet the Team

Evan Levine and Nainesh Shah enjoy working with connected, energetic people who want to stay engaged with life.

Long Term Care Calculator

Estimate your life expectancy and your long-term healthcare costs.

Debunking Sell in May and Go Away

Working in and around Wall Street for over 30 years, I have been exposed to many systems and strategies about investing. Although usually not explicitly stated, these strategies are "predictions" about what will occur in the markets in the short-medium term. Often there is

historical data cited to support the particular system or thesis. I have always felt that certain systems – like economics or geo politics – are too complex to predict what will occur in the short-medium term. One such system is “sell in May and go away”. [...]

Mid-June Update

Deciding When To Take Social Security: Retirement Planning Deciding when to take Social Security benefits is one of the most important decisions one will make for retirement. You may either base the decision strictly on monetary benefits, or your decision may be more personally based. The important question is when to start taking benefits, at age 62 or postponing benefits until age 66, or even later. The answer is different for everyone, as it depends on various factors such as health, lifestyle, and marital status. To determine how

much you've [...]

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