

Are You Within 5-10 Years of Retirement?

It's Time to SimpliFi Your Finances

Simplifi Retirement & Financial Planning

Retirement is complex. We help make it simple.



Plain English

Most people are not financial or investment experts that's ok- that's our job. We speak in plain English so you'll know what financial decisions will mean for your retirement.



No

Commissions. No Hidden Fees.

We adhere to the fiduciary standard by putting your interests first. Our fees for investment management and financial planning are transparent; we receive no hidden fees. Period.



No Judgement

We don't lecture or preach. Our main focus is providing you with solutions.

Meet the team

SimpliFi employs a team approach designed to assure continuity of service to our clients. Our firm is structured so that someone will always be available to you now and through every stage of your life in the future.



LEARN MORE ABOUT THE TEAM →

SimpliFied Retirement

We understand that investment choices can seem endless. We help make retirement planning easy by providing:

Simple answers to common questions.

We estimate how long your retirement assets will last based a number of factors including age, risk profile, lifestyle needs, investment growth and rates of withdrawals.

Clearly defined retirement strategy.

As you near retirement, you need to have a clear understanding of when, how and if you can retire and an easy-to-understand plan to get you there. We walk you through an easy-to-follow retirement transition process, provide ongoing management and help you plan withdrawals over the duration of your investments.

Clarity for complex situations.

We understand that every family is unique and may have complicated scenarios that affect their spending and finances. We are equipped to handle the complexity of individual and family situations—children, health, marriage, divorce, death—that affect financial decisions.

Simple solutions.

We help streamline sophisticated investment plans.

Top 10 Tips to SimpliFi Your Retirement

*To get started on the road to your retirement, download our free guide called **Top 10 Tips to SimpliFi your retirement.***

DOWNLOAD GUIDE

Retirement Strategy

*At **SimpliFi**, we help make transitioning into retirement a simple and smooth process, so you can retire with confidence and peace of mind. As part of our process, we'll help you to:*

Know where you stand.

We'll assess your current financial situation and needs, as well as the many options for retirement income available to you including your 401(k), pension, and IRA.

Plan your retirement income.

We'll help you develop a strategy with an objective of stable income and support for your lifestyle through retirement. Retirement income planning will help you enjoy life after you've stopped working so that you don't have to pinch pennies or feel financially insecure.

Take action.

With SimpliFi, you're not in it alone. Our team will walk you through every step as we create a comprehensive and effective action plan in preparation for transition into retirement.

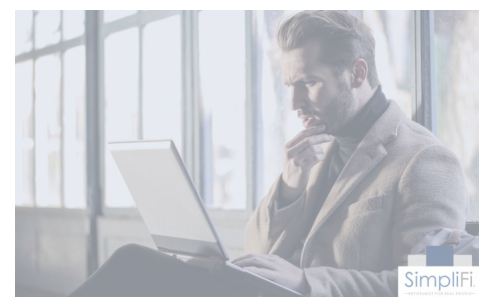
Latest Blog Posts



**Beware of
Social Security**



**When Can I
Retire? [Video]**



**What You Need
to Know About**

Voicemail Scammers!

[Video]

Has this ever happened to you? If you haven't received a call or voicemail from this automated system, beware! Many people are taking this call seriously, returning the call to this scamming company, [...]

That's the big question in retirement planning, isn't it? There are a couple of key ages you should be aware of, as well as where you're at in terms of your stage of life. Age 59 ½, by rule of thumb, [...]

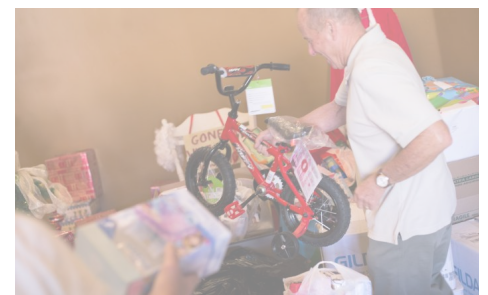
Your 401(k) and IRA in 2019

If you imagine your retirement nest egg as a house, then your 401(k) and IRAs are the tools you use to design, build, and remodel it. You want your house to last for years to come and to support your [...]

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Giving Back

At **Simplifi**, we aim to make a difference, not just with our clients but in our community at large. We care about much more than just creating wealth. For us, true wealth is about more than just money; it's about giving back. We believe that a community that works together toward creating opportunity and security is a successful one. It's important to us that we make a positive contribution where needs exist, and with causes we hold close to our hearts.



Giving Back: Toys for Tots 2018

SimpliFi clients have done it again! Hundreds of children have a bright Christmas, thanks to your donations. SimpliFi made an additional \$5,000 donation to this worthy cause. Giving back is a passion [...]

Giving Back: Toys for Tots

Toys for Tots mission is to collect new, unwrapped toys during October, November and December each year, and distribute those toys as Christmas gifts to needy children in the community. We have been a [...]

Giving Back: San Diego Rescue Mission

In 2016, clients of SimpliFi donated over \$4,500 of toys to the San Diego Rescue Mission “On behalf of the Mission, thank you to the SimpliFi Team and their wonderful clients for the generous toy dona [...]

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