





Consolidate, Coordinate and Simplify.

Our dedicated team is here to work closely with you to ensure *Happiness in Retirement*.

7 Steps to a Happy Retirement (that don't involve money)

These seven simple steps have nothing to do with money, but will help you to be happy in retirement. Intrigued? Download this free e-book without obligation.

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From the Happiness in Retirement Blog



What is Retirement Planning?

Dec 19, 2017

Bill Del-Sette's Definition In the following blog post, I'll walk you through the first few steps in starting to plan for retirement. Step
1: Determine Your Values Based
Goals "Dreams with a Deadline"
Values don't change with life conditions, and they are the bedrock...
read more



Del-Sette's Retirement Planning Definition

Dec 6, 2017

We all have our own definition or a preconceived notion of what retirement planning is. However, if we take it a step further and dive deeper into retirement planning it becomes an esoteric topic that can cause confusion for many. My definition of retirement planning... read more



Asset Protection – Building a Moat Around Your Modern Financial Castle

Aug 1, 2017

In the medieval days, a person's wealth would be stored in their castle, and a moat was built around the castle to protect it. The knights knew that if the moat was penetrated, there would

be no do-overs to rebuild the castle, so

they tried to get it right the first... read more

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