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# Build wealth so you can live well.

As Retirement Specialists we help individuals and retirement plan sponsors implement simple steps towards retiring successfully, happily, and with dignity and confidence.



## Financial Planning

Retirement Planning is an ongoing, never-ending process. Life is always changing and our customized planning is designed to flex with your unique needs.





## Investment Management

Professional money management requires serious consideration: Who is managing your portfolio? What it is costing you? Is the performance meeting your needs?



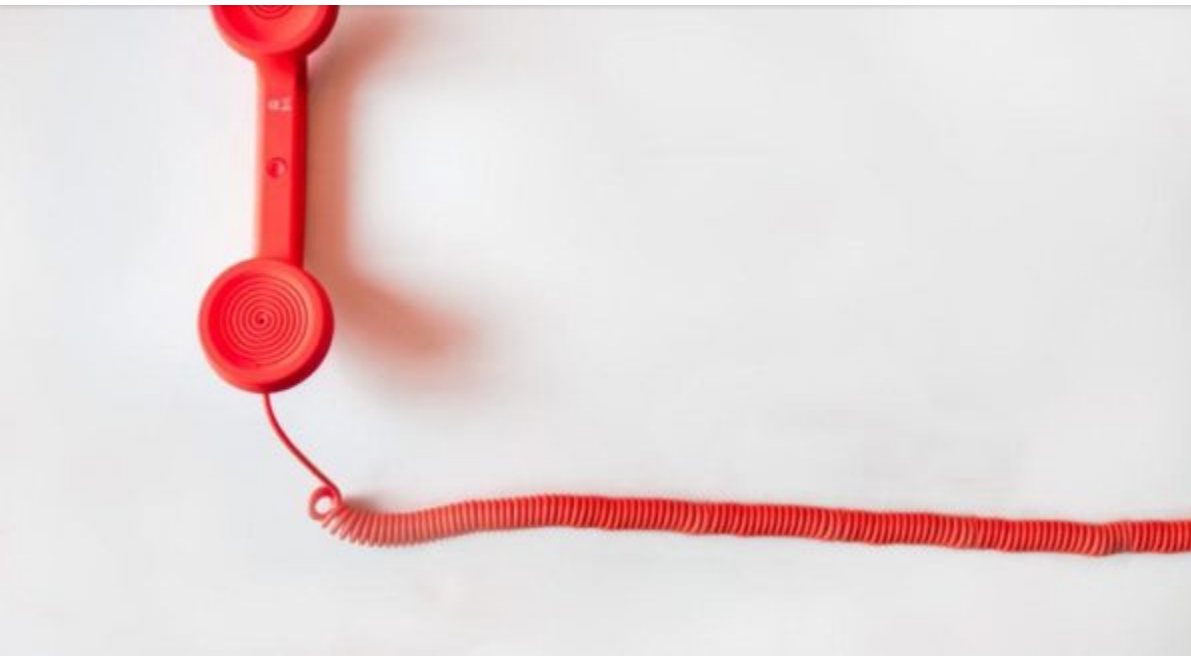
## Plan Sponsor 401(k)

If you are a business owner and you're considering offering a 401(k) to your employees, we can help you on two different levels.

**VIEW OUR OFFERINGS**

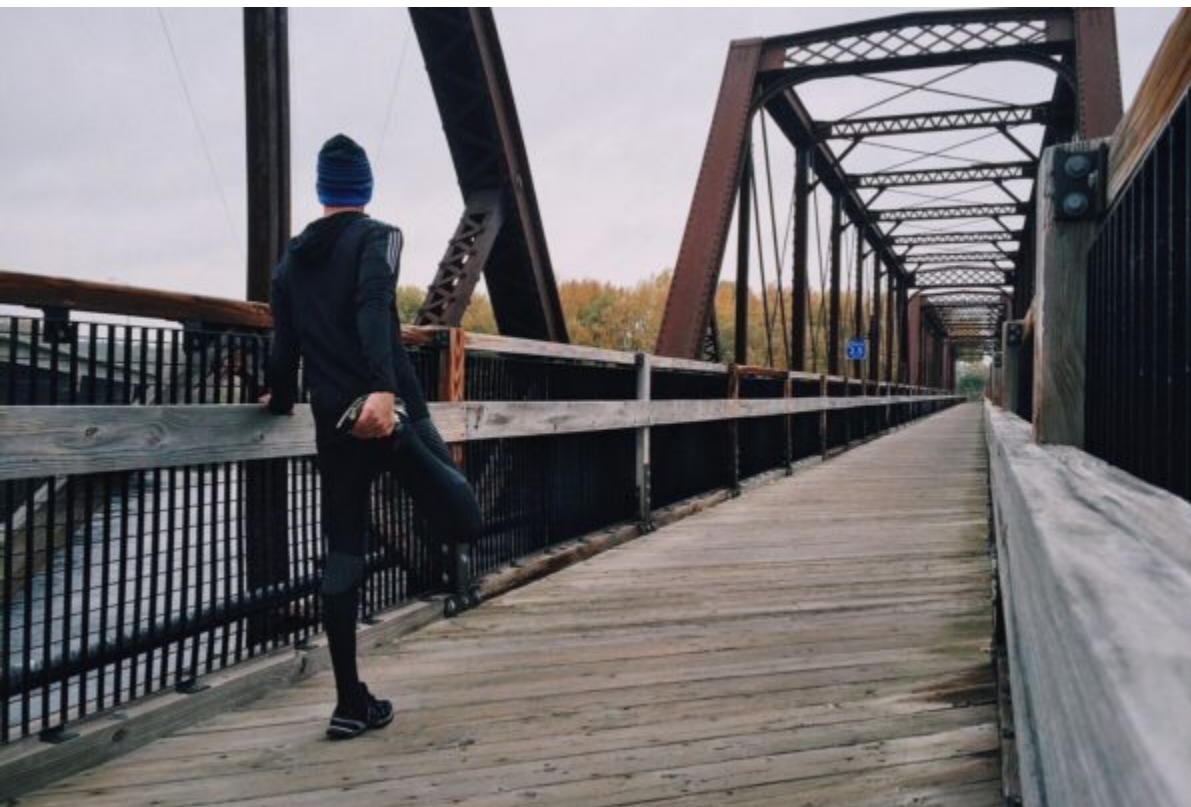
OUR FEATURED POSTS





## Calling It: The Exciting Day When Financial Independence Just Happens.

"I think we're going to be able to call it.", Austin says as we review our client's financial plan and assets on the big screen in my office. We've been...



## You Want Financial Independence? Here's the First Step

Only a very small percentage of American's will ever experience financial independence. Why? Because just being successful in our professional careers is not enough. We have to know how to...



## A Life Lived

You have never heard of any of my heroes, so naming them by name is unimportant. Besides, my hero's are not interested in the publicity. My hero's lead quiet...

## Retirement Planning Can Be More Complicated Than It Seems: 4 Traps

Consumers and practitioners alike often fall into a trap. In lieu of calculating a retirement plan, we instead rely too heavily on oversimplified rules of thumb and general advice. Rules...

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## You Work Too Hard to Settle For Good Enough

Meet with us for a free consultation.

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Client Process [>](#)

Investment Process [>](#)

## HELPFUL INFORMATION

April 7, 2019

**Try Not to Say This if You Want to Enjoy Financial Success – Video**

April 7, 2019

**The Most Frustrating Financial Product – Life Insurance – Video**

April 7, 2019

**Good Tax Habits Lead That Lead to Better Financial Health – Video**



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