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LIVE YOUR DREAM RETIREMENT

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We use financial tools and strategies to help you achieve your goals.

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LIBERTY GROUP

ESTATE LAW • WEALTH MANAGEMENT • TAX PLANNING

GET TO KNOW OUR TEAM

Discover how we help
individuals and families
achieve their ideal
retirements.

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S T E P 1
DISCOVER

Are we a good fit?

Share your story, clarify your values, identify goals and dreams, discuss concerns, and provide statements.



S T E P 2
DIAGNOSE

Can we add value?

Perform risk assessment, evaluate fees and risk, stress-test current portfolio, identify potential pitfalls, uncover opportunities, share our approach, decide if we're a good fit, transfer existing assets, and review current plan.



S T E P 3
DEVELOP

Build a tailored plan.

Structure retirement income, optimize social security, utilize tax efficient solutions, develop an investment strategy, and Plan for long term-care.



STEP 4 DELIVER

Review & Finalize.

Financial progress report, updated account summary, review new accounts, setup online access, set review frequency, identify missing pieces, and establish next steps.



STEP 5 DEDICATE

An ongoing relationship.

Periodic review meetings, account monitoring, regular refinement of plan, consistent communication, value-added services, workshops and webinars, client events and socials, tax preparation service, informational resources, and a financial concierge

DOWNLOAD FREE COPY!

JULY 9

Educational Workshop – Social Security Blueprint

7:00 pm | **Moraga Library – Contra Costa County Library Community Room**

REGISTER

([HTTPS://LIBERTYGROUPLLC.COM/EVENT/EDUCATIONAL-WORKSHOP-MARKET-SMART-JULY-9/](https://libertygroupllc.com/event/educational-workshop-market-smart-july-9/))

JULY 11

Educational Workshop – Social Security Blueprint

7:00 pm | **Moraga Library – Contra Costa County Library Community Room**

REGISTER

([HTTPS://LIBERTYGROUPLLC.COM/EVENT/EDUCATIONAL-WORKSHOP-MARKET-SMART-JULY-11-2/](https://libertygroupllc.com/event/educational-workshop-market-smart-july-11-2/))

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[Careers \(https://libertygrouppllc.com/careers\)](https://libertygrouppllc.com/careers)

OUR LOCATION

411 30th Street

2nd Floor

Oakland, CA 94609

[Get Directions](#)

<https://goo.gl/maps/mN5A5rbqGbE2>

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