

Wealth Enhancement Group®

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All the specialists you need, all in one place. All dedicated to simplifying your financial life.

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A 3-step process designed to simplify your financial life

Organize.

We collect your financial information and consolidate it into your UniFi™ inventory.

Collaborate.

Our Roundtable™ team approach helps ensure your financial plan is covered from every angle.

- Financial planning
- Retirement income planning
- Tax strategies
- Investment management
- Estate planning
- Insurance

Guide.

We clarify your options and put your plan into action, supporting you every step of the way.

Resource Library

Insightful articles, guidebooks, videos and more from our Roundtable team of specialists and advisors.

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Retiring in the Gig Economy

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Financial Advice for Single People

With independence day coming up, Bruce and Peg do a play off the country gaining freedom to help all of the independent people out there with their financial...

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 Tips for Launching Your Adult Children into the Working World

Tips for Launching Your Adult Children into the Working World

With college graduations now at an end, many parents are welcoming their grown children back into their homes. Bruce and Peg discuss how to help your adult...

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 ARTICLE

 Are you Forcing Unintended Financial Outcomes on Your Children?

Are you Forcing Unintended Financial Outcomes on Your Children?

When building an estate plan, the primary focus is typically how to transfer assets to heirs. Often it's split equally, and sometimes it's not. Regardless,...

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 ARTICLE

 How to Properly Plan for Retirement

How to Properly Plan for Retirement

When it comes to retirement planning, savings often dominate the discussion. But, saving for retirement is only part of the picture. Establishing an *income* plan for retirement—one that addresses *how* and *when* to translate those savings into income—is just as important.

There is no one-size-fits-all solution for achieving this balance. However, these tips can help you navigate the many considerations that go into a retirement income plan.

1. Put a Price Tag on Your Ideal Retirement

Start by asking yourself, how much will your desired retirement cost per year? This will include your basic expenses like housing (mortgage payment, home maintenance and repair expenses, association fees and property taxes), medical expenses (insurance premiums and co-pays and prescription costs), transportation expenses, debt payments, utilities and food (both dining in and dining out).

Next, how will you spend your time while you aren't working? Chances are whatever you will do in your leisure time will come with a cost. And be realistic. Though you may plan to spend conservatively during the transition into retirement, more...

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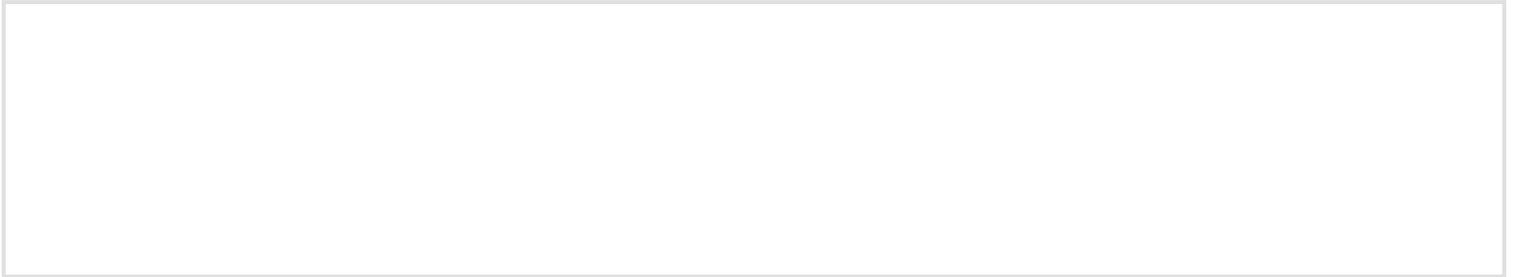
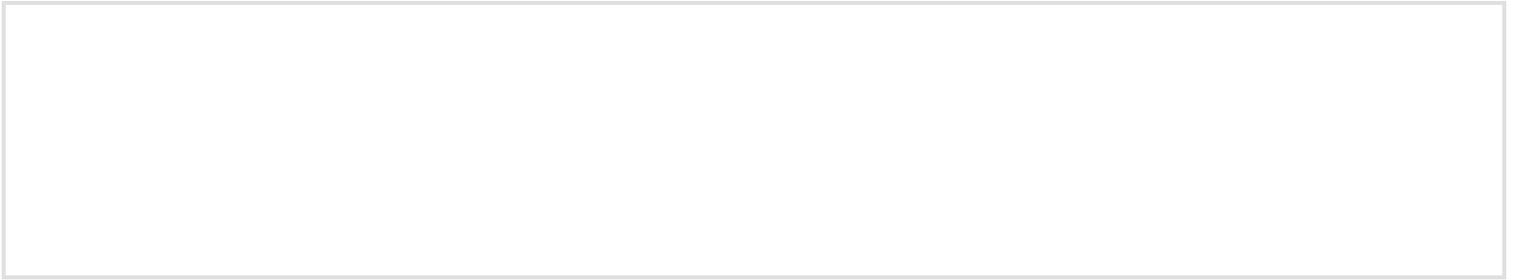
Your Retirement Roadmap: A Step-by-Step Guide to Navigating Your Financial Plan

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A Reality Check on Your Retirement Income



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