TRUSTED RELATIONSHIPS AND PARTNERSHIPS ARE THE BASIS FOR SUCCESS.

Welcome to The Estate Planners Group

David Loesser, CFP™, President

I began the company with the thought that if retirees and pre-retirees were going to be successful in retirement they needed an advocate, someone that was completely unbiased, someone they could trust. Having worked at Prudential in the late 90's I found that often times larger financial institutions were more interested in pushing their own products rather then objectively helping investors. Investors needed an "unbiased independent approach". I believe we offer that. Over the last two decades I have added skilled and experienced staff to our team. As you will see in our bio's we have formal academic financial training and decades of world experience.

"While no company can be perfect in all they do...Over the last two decades we are happy to call clients our friends. We believe it is only in the context of a trusted relationship that a basis for success can be achieved."

retirement SMART

EDUCATION TO TAKE CHARGE & PLAN FOR YOUR RETIREMENT

REGISTER NOW!

Information abounds today but information is not the same as education. Knowing where to turn is very important. The *Retirement Smart* course cuts through the fog of information and bad advice to provide a clear path as you plan for and live through retirement. The course will equip you to take charge of your retirement future by giving participants the tools and insights to make informed decisions. You will learn how to optimize your retirement income, reduce taxes, position investments to meet your needs, make informed choices regarding Social Security and Medicare as well as practical and cost effective estate planning strategies. In this course we will address the current state of the economy and the stock market. Regardless of the current economic scenario we will help you to hold unto principles that last and eliminate the fears that retirement can generate.

CLICK ME

OUR SERVICES

ESTATE PLANNING

TAX PLANNING

TAX PLANNING

INCOME PLANNING

INCOME PLANNING

INVESTING / ASSET ALLOCATION

INVESTING / ASSET ALLOCATION

401K – INVESTMENT SELECTION

401K – INVESTMENT SELECTION

LEGAL SERVICES

STRATEGIC INVESTORS. PROVEN OUTCOMES.

Passion

While most professionals and investors never integrate/coordinate their key financial areas’s, we work with you to coordinate financial area’s to develop your “Financial Life Plan”. Our goal is to ensure you have the resources to enjoy your retirement and provide for your family.

Expertise

“10,000 Baby Boomers will retire each day for the next 19 years.” This number quoted from a Social Security Report in 2012 is daunting…like a tidal wave crashing for nearly 20 years. The demands and needs of retirees will surpass virtually every other need expressed by people of this age. The Estate Planners Group is here to help you find the best possible solution for your retirement needs and guide you through all the complex issues of retirement.

Education

The *Retirement Smart* course will guide participants in creating realistic retirement goals and also provide practical insights for reaching those goals. It moves beyond basic concepts such as the differences between Roth and Traditional IRAs and is designed to provide practical, real life help for adults who are preparing for or already navigating through retirement. **Take charge of your retirement.**

We are here to help you find the best solution for your retirement!

CONTACT US