

 **Call Bill Now!**
(518) 855-4065

[Home](#) [Meet Bill](#) [Advice & Consulting](#) [Investment Portfolio Management](#) [Knowledge Center](#) [Become a Private Client](#) [Contact Info](#)

Invest and retire with confidence!

As Seen On...



[See more places where Bill has appeared...](#)

MONEY MANAGEMENT

- Asset Allocation
- Portfolio Structure
- Tax Management
- Specialist Money Managers
- Continuous Portfolio Management

ADVICE & CONSULTING

- Our Planning Approach
- Core Beliefs
- Why BLRS?
- Ideal Client Profile

ABOUT US

- Meet Bill
- Our Team
- About BLRS
- Street Cred
- Old Fashioned Values
- FAQs

QUICK LINKS

- [IRA Rollover Helpline@](#)
- [Bill's Blog](#)
- [Media/Press Inquiries](#)
- [Live Events](#)
- [Contact Info](#)

Disclaimer: Bill Losey Retirement Solutions, LLC is an independent fee-only registered investment advisory firm that specializes in helping women and couples age 55+ create retirement security, peace of mind, and live the best life possible with the money they have. Bill's blog, economic commentary, newsletter, case studies, podcasts, movie and videos are meant to provide you with broad general investment, financial and retirement information. They are not designed to be a definitive investment guide or to take the place of a qualified financial planner or other professional such as an accountant or estate planning attorney. Past performance is not a guarantee of future returns. Investing in securities involves a risk of loss that you should be prepared to bear. Given the risks involved in investing, there is absolutely no guarantee that the strategies or methods suggested on Bill's website will ever be profitable. Bill Losey Retirement Solutions, LLC does not assume liability of any kind for any losses that may be sustained as a result of applying the methods suggested and any such liability is hereby expressly disclaimed. Portions of the content on this website were prepared by MarketingPro Inc. For more information or questions, please contact Bill Losey at 518-855-4065.

