

The Kuta Group

☎ (443) 519-5481

Welcome to The Kuta Group

Listen to "On the Money" WCBM 680 AM Saturdays from 12:00 - 1:00pm!



Call 443.519.5481

To schedule a consultation. The markets today can be unpredictable with extreme swings. The success of any retirement solution may depend on a well-designed, long-term asset allocation strategy. We specialize in comprehensive retirement and retirement income planning. Our office is conveniently located in Timonium, MD. We are always available to speak with you about your retirement and retirement income needs.

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Savvy Social Security Retirement Planning: What Baby Boomers Need to Know



Listen to "On the Money" with Gil on WCBM 680 AM



Gil dressed as Santa Claus to benefit the Casey Cares Foundation.

Our Approach

Our style combines your objectives into a tailored strategy that can be updated as life changes take place. We blend extensive investment experience with professional resources to help complement your objectives with personalized solutions.

Our process includes:

- *Understanding You* — we want to know more about you. Are you retired? How many years until retirement? What is the balance of your mortgage, if any? Is your estate planning complete? Are your

insurance needs met? By learning about you, we can propose a plan that meets your objectives.

- *Gathering Your Current Financial Information* — together, we gather specific information on your financial picture. Do you have a 401k? Do you have a pension? What will/is your social security benefit? Do you have a ROTH IRA? Do you have 6-12 months of emergency money readily available? There are many important questions that need to be considered.
- *Developing Smart, Time-Tested Strategies* — next, we analyze your financial and personal information to match your objectives with sound strategies. We believe in using high quality investment vehicles for our clients.
- *Implementing Thoughtful and Creative Solutions* — we develop customized solutions tailored to your objectives, drawing from a wide selection of world-class products and services.
- *Providing Timely, Ongoing Service* — we regularly review your situation to help ensure your financial objectives are being met. There will be no voice response systems and waiting in queue. You receive timely, personalized service.



About Us

Our company is built on a solid foundation of excellent client service and in-depth market knowledge.

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Become a Client

Becoming a client with us is easy as it is rewarding.

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