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Successful Money Strategies, Inc.

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Everyone Deserves a Successful Retirement

We love helping our clients in the life-long journey of preparing and ultimately enjoying their retirement.

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Successful Money Strategies offers a full service and unique financial planning experience focusing on a holistic approach encompassing virtually all of your money issues. Located in Fall River - the heart of the Southcoast, our clients are located all over Southern New England as well as New Hampshire, Maine, and Florida.

PRODUCTS & SERVICES





[Tax Planning \(/products-services/tax-planning\)](/products-services/tax-planning)

"You need to be looking ahead to see what can be done today to save you money in taxes tomorrow."



[Investment Planning \(/products-services/investment-planning\)](/products-services/investment-planning)

"The best way to avoid making bad investment decisions is to have an investment plan and stick to it."



[Retirement Planning \(/products-services/retirement-planning\)](/products-services/retirement-planning)

". . . you won't have a safety net anymore. There is no more job to fall back on."



BLOG



[Second Quarter 2019 Commentary](/blog-01/second-quarter-2019-commentary) (/blog-01/second-quarter-2019-commentary)

By Dennis O'Keefe on Jul 1, 2019

There aren't many years when the market rises this high in the first six months of a year. Since January 1, the market is up 17%. Although, as you recall, much of this gain was to make up from the late-year downturn we saw in 2018.

A similar dip occurred in May. For the same reasons – the China trade deal. The market is very temperamental when it comes to trade negotiations. It also doesn't help when the entire country is so politicized. Any market move that is driven by the federal government is magnified.



[READ MORE \(/BLOG-01/SECOND-QUARTER-2019-COMMENTARY\)](/BLOG-01/SECOND-QUARTER-2019-COMMENTARY)



[The Gig Is Up!](/blog-01/gig) (/blog-01/gig).

By Dennis O'Keefe on Jun 10, 2019

Financial success is more than finding the best investments and monitoring our cash flow. It's understanding the world around us and using it to our advantage. This starts first with understanding our world and how it is changing.

Over the next several issues, we will analyze our world a bit to help us get the building blocks for good financial decisions in the future. They may not be 100% relatable to typical "financial" articles we may publish, but I hope you enjoy them just the same.

[READ MORE \(/BLOG-01/GIG\)](/BLOG-01/GIG)

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