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Welcome to Vermont Wealth & Retirement

Strategies for the Seasons of Financial Security

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Your Future

Our first priority is helping you take care of yourself and your family. We want to learn more about your personal situation, identify your dreams and goals, and understand your tolerance for risk. Long-term relationships that encourage open and honest communication have been the cornerstone of my foundation of success.

Our site is filled with educational videos, articles, slideshows, and calculators designed to help you learn more. As you search our site, send me a note regarding any questions you may have about any particular investment concepts or products. We'll get back to you quickly with a thoughtful answer.



Planning for Retirement

The Vermont Wealth approach is unlike other financial advisors.

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Coach or Advisor?

So what is the difference between a coach and advisor?

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Healthcare in Retirement

Understanding Medicare is an essential part of your retirement strategy.

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Vermont Wealth & Retirement, LLC

Office: 802.489.5310

Fax: 802.497.0470

110 Kimball Avenue

Suite 118

South Burlington, VT 05403

tcarney@vermontwealth.com

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