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SHARP ADVISORS
Simplifying Retirement™

704 357 8500

REFER US

REQUEST AN APPOINTMENT

Here at SHARP ADVISORS we believe in personalized service and have earned a reputation in our industry for excellence in customer service. Clients can expect clear communication and down-to-earth relationships with our advisors.

Retirement planning doesn't have to be complicated. You know what it took to get you where you are: hard work, realistic goals, and integrity. What you need now is someone who can grasp your vision and help chart a course to give your aspirations life. We will work with you to help you articulate, plan for, and pursue your goals.

While we are most noted for working with employees at AT&T and Duke Energy, we also work with other companies, both large and small. If you're interested in any of our planning or investment management services, we encourage you to contact us, either through email or by calling us at 888-955-8500. One of our advisors will be happy to answer your questions and direct you further.

You can learn more about What We Do, Why We Do It, and How We Help, by checking out these sections below.

WHO WE SERVE

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Click the learn more button for programs and resources that benefit AT&T employees.

LEARN MORE

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Click the learn more button for programs and resources that benefit Duke Energy employees.

LEARN MORE

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Learn about creating a SHARPER retirement with SHARP ADVISORS as well as our other asset management services no matter where you are at today.

LEARN MORE

WHAT WE DO

By working with a retirement professional at SHARP ADVISORS, you can feel more confident about the future. Working with individuals and families in all stages of retirement planning, we offer a wide array of services, including:

Income Planning

Income planning is a critical element of a solid retirement strategy. A major financial goal is to have a consistent and reliable stream of income that will last throughout your retirement. We help clients address critical questions, such as how to shift from retirement savings to retirement income, how to estimate monthly income, and how to prepare your assets to potentially last a lifetime.

Investments and Asset Management

Many clients transitioning into retirement are focused more on managing and preserving their wealth and less on their comfort level with risk. We focus on your goals, objectives, time horizons, and risk tolerance. Then we craft an individualized retirement plan to your specific needs for income and future expenses.

Benefits Plan Optimization

Executive compensation packages and employee benefit plans offered through your employer are a great way to save for retirement. However, selecting the best investment options and maximizing contributions can cause uncertainty. We can help you understand how your retirement plan works and how to potentially optimize benefits as well as coordinate your plans with your other retirement and investment strategies to pursue your retirement goals and objectives.

Social Security

As clients approach retirement, many have a number of questions regarding Social Security. How much will my income benefit be? How do I maximize my benefits? When should I begin taking Social Security? We understand the complexities of Social Security and have the resources to address our clients' questions.

Investments and Asset Management

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Insurance

As individuals age, the need for insurance changes. Products like life insurance, long-term care insurance, and annuities, both fixed and variable, are ways individuals can protect their family and assets. With so many available programs and plans, we help clients determine an appropriate solution.

Estate Planning

Many individuals, couples, and families don't just want to make their assets last for their lifetimes; they want to leave a legacy for their heirs. However, the financial side of estate planning is often overlooked and can have a significant impact on one's family. We can assist clients in articulating their estate planning needs and coordinate the work of other professionals who may be needed, including attorneys and CPAs.

WHY WE DO IT

At SHARP ADVISORS is to design an integrated plan that emphasizes preparation and sustained growth for those nearing or living in retirement. We meet with you to understand your current economic situation, aspirations, and goals. We are passionate about helping you enjoy your golden years, living off the assets you have worked so hard to accumulate.

While developing a customized financial program, we walk you through a step-by-step process designed to help you feel confident in your decisions. We'll provide you with a complete and accurate assessment of where you are today and what you need to do to reach your retirement goals. Our plans are based around the "what ifs" of life and can be adjusted as life situations change. Retirement Planning is not a one-time event; it's a life-long journey.

HOW WE HELP

We understand the complications of retirement planning. Our goal is to help you avoid the common pitfalls and mistakes people make and develop a comprehensive action plan that addresses your unique needs. We develop long-lasting relationships with our clients and future clients to develop a personalized action plan, with regular reviews, while on the road to financial independence and beyond.

Some questions we can help you navigate include:

- How can I get the most out of my 401(k) and/or IRAs and my company's pension plan?
- When can I retire?
- How can I create a steady stream of income that lasts through retirement?
- What is my Social Security strategy?
- What's the risk in my investment portfolio?
- Do I have enough life insurance for my family?
- Should I consider long-term care insurance?
- What are the elements of a sound estate strategy?

At SHARP ADVISORS, we are strong advocates of education and aim to teach and explain concepts that may, at first, seem complex, so we simplify the information for your needs. We have the resources and experience to keep you up-to-date with the latest market changes and to manage your investments and financial strategies. We help you every step of the way. Our seamless, proactive approach aims to reduce worry and saves you time. Contact us today to get started.

Contact

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