

Below are three fundamental basic planning concepts that, without clear guidance and careful preparation, can unfortunately become financial pitfalls hindering one's long term success. Learn what strategic protection solutions may be optimal in support your long term financial goals.



LONG-TERM CARE:

- What if I get sick?
- What if my spouse needs care?
- How can I avoid a nursing home?
- How can I get tax-free income for in-home care?
- 2 out of 3 couples over 65 will need long-term care for at least one partner at some point

RETIREMENT:

- Will I have enough income in retirement?
- How can I be sure I won't outlive my money?
- How much guaranteed income do I have in my portfolio?
- How protected am I from market risk?
- Is my portfolio in line with my risk tolerance?

ESTATE PLANNING:

- What happens when I die?
- How will my family be impacted?
- What kind of estate do I want to leave behind?
- Are my beneficiaries up to date?
- How can I pass on my estate tax-free?

In the realm of financial planning, we know there is no one-size-fits-all, and there are no shortcuts to reaching long term success.

At Lifetime Wealth Solutions, we focus on a methodical and holistic approach to design customized strategies to help you reach your goals.

When it comes to supporting your future, simply plan to live better.

Experience Our Proven Process



Planning Solutions

- Qualified Plans – 401(k), 403(b), IRA, Roth, SEP
- Tax-efficient Investments
- Non-Qualified Assets
- Roth Conversions
- Education Funding
- RMD Planning
- Tax Bracket Planning
- Estate Planning
- Life Insurance
- Long-Term Care
- Annuities