RETIREMENT PLANNING

Designed for Complex Financial Lives

Retirement is more than a projection.
It is sustainable income designed for longevity,
healthcare, and changing priorities.

PRE-RETIREMENT & TRANSITION STRATEGY

Optimizing the 5–10 years before financial independence

- Retirement Readiness Analysis
- Income Gap Modeling
- Employer Benefit Optimization
- Equity Compensation Strategy
- Healthcare Funding Design

INCOME DESIGN STRATEGY

Designing sustainable, tax-efficient retirement cash flow

- Multi-Phase Income Structuring
- Strategic Distribution Sequencing
- Roth Conversion Mapping
- Social Security & Pension Integration
- Longevity And Inflation Stress Testing

TAX PRECISION PLANNING

Managing lifetime tax exposure before and throughout retirement

- Multi-year Tax Bracket Strategy
- Capital Gain Control
- Medicare IRMAA Planning
- Asset Location Alignment
- Qualified Charitable Distribution Planning

BUSINESS OWNER RETIREMENT STRATEGY

Aligning enterprise value with personal financial independence

- Advanced Qualified Retirement Plan Design
- Pre-sale Retirement Optimization
- Liquidity Event Income Modeling
- Succession Income Coordination
- Post-sale Capital Deployment Strategy