ECON WEALTH MANAGEMENT

RETIREMENT PLANNING SOLUTIONS GUIDE

A GUIDE OF HOW WE PLAN FOR RETIRING YOUR WAY

We offer a variety of Retirement Planning Solutions to assist you in your journey so that you find comfort knowing you have a plan that works.

Core Areas

Retirement Readiness

- Annual Plan Review Process
- Plan and test retirement scenarios under different market conditions
- Pre-retirement meetings

Savings Goals

- Plan for your "Now Money" and "Later Money"
- Develop personalized goals based on needs, wants, and wishes
- Monitor savings progress and advise as goals evolve

Withdrawal Strategy

- Optimize withdrawals for tax efficiency.
- Coordinate Social Security and other income.
- Adjust income as your needs evolve.

Retirement Transition

- Build your retirement income plan.
- Coordinate benefits, accounts, and cash flow.
- Prepare for the financial changes ahead.

Advanced Planning Services

Healthcare

We coordinate with healthcare and Medicare professionals to provide cost effective care to meet your needs.

Social Security

Our planning software analyzes advanced timing strategies to help maximize your income and lessen taxes.

Tax Planning

We coordinate with CPAs and analyze your scenario to suggest high level strategies for specific tax situations.