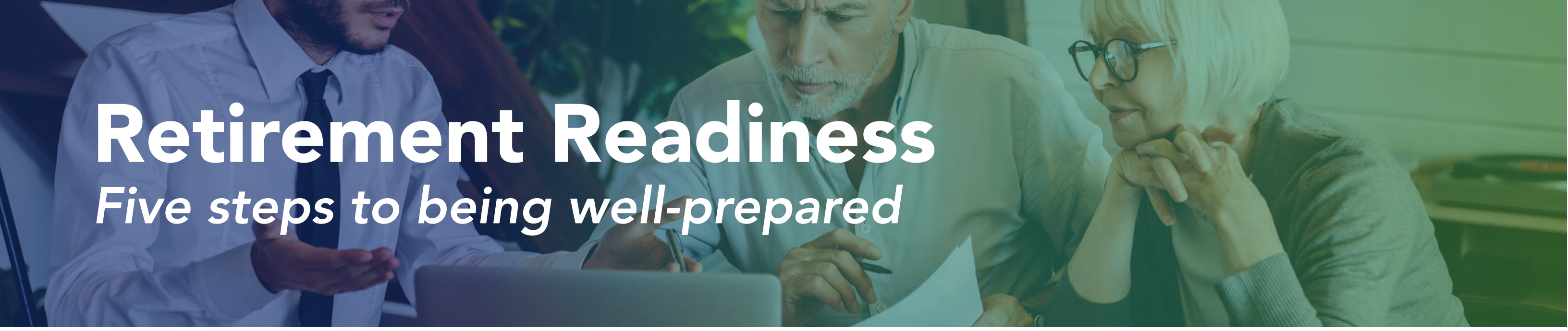

Retirement Readiness

Five steps to being well-prepared

Our Approach to Retirement Planning

When making the decision to leave the workplace for retirement, our team creates a personalized plan to help you be well-prepared. We provide a roadmap to help create an investment strategy with the goal of maximizing lifetime income from your retirement portfolio.

Our Five Step Process

1 ENVISION YOUR IDEAL RETIREMENT
By determining your goals, our team is able to start curating a personal plan to help you reach them.

2 UNDERSTAND YOUR FINANCIAL REQUIREMENTS
We help you put together a budget to help you achieve the retirement goals you have set for yourself.

3 DETERMINE YOUR RETIREMENT READINESS
We take all of your financial information to determine your Retirement Readiness Score, determining where you are at now and helping you plan how to get to where you want to be.

4 EVALUATE YOUR TAX SITUATION
We break down all of the tax distributions and create a tax-efficient distribution strategy personalized for you.

5 RECREATE YOUR PAYCHECK
Our team gathers information from all of your sources of income, including social security benefits, pension, and investments to create a "paycheck" for your retirement.

We use these five steps to help lay the foundation for a well-prepared retirement. If you want to receive a free Retirement Readiness consultation, call (888) 895-4797, or email us at info@QuotientWealth.com.

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