

WWG Client Finds a Financial Life Plan

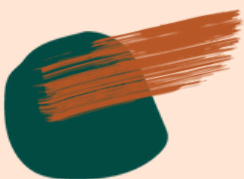


Beverly came to WWG after her husband, Ken, had passed away. He had handled all the finances of the marriage, and she needed guidance on how to settle his estate and how to set up new accounts in a tax-advantageous manner. She comes to the meetings with a great foundation as she was

a school teacher and absorbs information quickly. What she needs is guidance and facilitation of her financial life plan. She is in her 70's and fully retired, so her income is dependent on these large financial decisions.

While working with WWG, her retirement has remained uninterrupted. She has been able to grieve without stress around the money picture. We successfully consolidated all of Ken's accounts into her name, and she soon after completed her estate planning for her son. It became a bit complicated as her and Ken had a blended marriage, so she received clarity and direction from WWG on how to set up accounts according to her wishes. She also received a strategic income plan for her retirement assets – including her Required Minimum Distributions (RMDs). Because she continues to receive pension and social security income after Ken's death, her main goal has been to have her investments keep pace with inflation while safeguarding against major losses in the market.

Beverly was able to create an income strategy, set up a “WWG 3 Bucket Allocation Strategy” for her cash and investments, and strategize annually on her RMD & investment strategies. WWG facilitates all her minimum distributions, tax withholdings, and ongoing investment management. Beverly has been able to experience volatile markets without worry because of the planning and conversations she has with WWG. She is confident in her lifetime retirement income plan + legacy strategy for the next generations.



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Client's name has been changed to protect their privacy.

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