



Case Client(s): John & Sandy
Age: 60 & 55
Occupation: Retiree & Exec. Admin
Primary Goal: Retirement income plan
& relocation in retirement

Recent Retiree & Soon-to-Be Retired



Challenges

- Determining how much to save to fund retirement years
- Maximizing Social Security
- Relocation logistics

Benefits one

Confidence and clarity in their retirement income sources

Benefits two

Better understanding how they should approach Social Security

Benefits three

Time-saved due to direct coordination with realtors and accountants.

Approach

I collected data for a full financial review. The first step was to determine how much they needed to save to fund their retirement years. Next, we provided guidance on maximizing social security benefits. Lastly, we discussed various area of the country that met their criteria.

Solutions

Over several months I assisted with helping to establish a retirement plan with respect to relocation. I evaluated their retirement savings, helped to develop a savings plan to fund their retirement years, and create a plan to optimize their social security benefits. Lastly, we provided guidance on the logistics of moving, including selling their current home and buying a new one; we connected them with several realtors for the real estate transaction.

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