



- +** EDUCATE
- ▶** ENGAGE
- +** EMPOWER

Coordinating Social Security and retirement income may help you get more and keep more.

“With over 70,000 claiming combinations from which to choose, individuals and couples can become confused and overwhelmed”

- Dr. William Reichenstein, Head of Research for Social Security Solutions, Inc.

Find out how we can help you maximize your retirement income.

ONE OF THE LARGEST FINANCIAL DECISION IN RETIREMENT — SOCIAL SECURITY.

Knowing Your **Options**

*How confident are you
in choosing your
social security options?
At Freedom Wealth Alliance,
your advisor can help you
make a smart claiming
decision by using robust
software with powerful
analytical features.*

Today your social security options and trade-offs are a little like a Rubik's Cube – hard to solve. There are thousands of Social Security Rules that can be combined for over 70,000 ways to claim benefits.

To help maximize your retirement income, let us show you how to get more, and keep more, with patented Social Security Analyzer software.

We compare and analyze strategies using head-to-head comparisons and tradeoffs in a personalized report.

We're here to help.

Our goal is to give you the best social security advice possible.

Get in the Social Security Zone – a new way to view longevity and the ability to look across mortality ranges which gives you a more optimal claiming strategy.

Retirement Income Coordination – we help you coordinate a social security strategy with a tax-efficient spenddown, possibly extending the longevity of your investment portfolio.

Compare and Analyze – We will show you head-to-head comparisons and tradeoffs, compare strategies and analyze rates of return on those strategies.



Do you really understand all of your Social Security claiming options?
Contact us for a complimentary discussion.



Want to gain Confidence over all the confusion?

Our goal is to give you appropriate social security claiming advice in alignment with your financial needs:

EDUCATE: We help you navigate through the strategies of claiming social security which can be frustrating to many retirees.

ENGAGE: We give you the ability to compare claiming strategies based on your specific financial goals.

EMPOWER: Once you've compared your options, and chosen what you feel works best for your situation you can enjoy the confidence that comes with making a well informed decision.

Retirement Income planning and coordination designed to give you more money in retirement.

The combination of optimal social security benefits and lower marginal tax rates can result in more spendable income in the long run.

- We graphically illustrate how strategies perform over ranges of time
- Compare claiming strategies based on your specific goals
- Our tax calculator allows you to view the impact on your benefits over time
- Getting ready for retirement - Our benefit calculator can give you a more accurate estimate of your benefits based on changing circumstances such as the desire to retire early



FREEDOM
WEALTH
ALLIANCE®

www.freedomwealthalliance.com

675 N. Barker Road | Suite 220 | Brookfield, WI 53045

P: 262.798.7979 | F: 262.798.8950

About Freedom Wealth Alliance

Freedom Wealth Alliance has over 100 years of combined experience in Retirement Planning, Financial Planning, defensive money management and complex financial strategies. We collaborate to develop tailored strategies with the goal of accumulating, managing, and preserving wealth for families and small businesses.

*Our goal is to offer you a confident approach to Living Well and Living Free,
however you define it!*

*As an investment advisor representative of Freedom Wealth Alliance, a Registered Investment Advisor, we are held to a fiduciary standard of care for all advisory clients and are fully committed to putting our clients' best interest first above our own.

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