

Aging Well

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AGING WELL: RETIREMENT PLANNING



Retirement Planning 101

Saving money for your retirement can not happen soon enough. Make sure you are prepared now.

Retirement is the last great stage in your life. It is full of new milestones, but it can take a lifetime to adequately plan and prepare for it. Many people feel overwhelmed with the details of planning for retirement or wish to avoid it altogether. But, retiring is easier than you may think – and well worth any trouble it takes to get there. After all, these are your golden years. Retiring doesn't make these years any less enriching than the other stages in life. It does the opposite. Seniors in retirement are often happier, healthier and get more out of life than non-retired seniors. Retirement is the last great stage in your life. It is full of new milestones, but it can take a lifetime to adequately plan and prepare for it. Many people feel overwhelmed with the details of planning for retirement or wish to avoid it altogether. But, retiring is easier than you may think – and well worth any trouble it takes to get there. After all, these are your golden years. Retiring doesn't make these years any less enriching than the other stages in life. It does the opposite. Seniors in retirement are often happier, healthier and get more out of life than non-retired seniors. Remember that planning for this time in your life is essential!

200 words (sidebar)

Early Investments in Retirement

Too many people do not plan ahead when it comes to their retirement needs. Starting your plan can be as early as in your 20s. At Fresson Financial Planning, they can assist you on any decisions regarding money, property, medical care, dependent care, and other matters that can arise when a person dies. The biggest benefit of estate planning is peace of mind—you'll know your wishes will be fulfilled for the benefit of your loved ones. At the very least, everyone should have a simple estate plan in place.

Organizing your affairs in preparation for the end of your life is an important task, and estate planning is an ongoing process that includes much more than writing a will. This type of planning helps determine who can make decisions on your behalf, who takes care of your dependents, and how to avoid unnecessary taxes and waiting periods. Estate planning covers any decisions regarding money, property, medical care, dependent care, and other matters that can arise when a person dies.

225 words (Main Text)

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BCDA Financial Planners of RI

BCDA Financial Planners, LLC offers services from estate planning to elder law. Frank and May will assist you with any of your needs and are available for a consultation. Email or give us a call to set up a meeting. bcdafinanceplan.com

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AGING WELL: ESTATE PLANNING



Estate Planning Check List

An estate plan can give you peace of mind. Here are some tips to make the process easy.

Create an inventory. Estate planning is the process of designating who will receive your assets in the event of your death or incapacitation.

Account for your family's needs. Estate planning is the process of designating who will receive your assets in the event of your death or incapacitation.

Establish beneficiaries. Estate planning is the process of designating who will receive your assets in the event of your death or incapacitation.

Review your beneficiaries. Estate planning is the process of designating who will receive your assets in the event of your death or incapacitation.

Note your state's estate tax laws. Estate planning is the process of designating who will receive your assets in the event of your death or incapacitation.

Weigh the value of professional assistance. Estate planning is the process of designating who will receive your assets in the event of your death or incapacitation.

Plan to reassess. Estate planning is the process of designating who will receive your assets in the event of your death or incapacitation.

200 words (sidebar)

Estate Planning is Essential

Protect your assets and be sure your future is secure. Organizing your affairs in preparation for the end of your life is an important task, and estate planning is an ongoing process that includes much more than writing a will. This type of planning helps determine who can make decisions on your behalf, who takes care of your dependents, and how to avoid unnecessary taxes and waiting periods. Estate planning covers any decisions regarding money, property, medical care, dependent care, and other matters that can arise when a person dies. The biggest benefit of estate planning is peace of mind—you'll know your wishes will be fulfilled for the benefit of your loved ones. At the very least, everyone should have a simple estate plan in place.

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SGS, PC

Sheehan Greenberg & Smith P.C. of John and Greg will assist you with any of your needs and are available for a consultation. Just give them a call to set up a meeting. sheehangreenbergsmith.com

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SHEEHAN GREENBERG & SMITH

ESTATE PLANNING

We are honored to continue to support our clients with tailored Will and Trust packages to assist with wealth preservation, asset protection, & life transitions.

**SIMPLE WILLS
 TRUSTS
 POWERS OF ATTORNEY
 ADVANCE DIRECTIVES
 FINAL INSTRUCTIONS
 HIPAA WAIVERS
 PARENT GUARDIAN
 CODICILS**

CALL US TO SCHEDULE YOUR FREE 30 MIN CONSULTATION!

Prior & Existing clients get \$250 off your estate package*

*Valid if redeemed within 2 months of offer; discount applied to final service payment

For any family, having an estate plan covers any questions and decisions regarding money, property, medical care, dependent care, and other matters that can arise. The biggest benefit of estate planning is peace of mind and know your wishes will be fulfilled for the benefit of your loved ones. Set up an appointment by calling at 401-200-0765 and we will discuss a plan that is best for you and your loving family!

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