CLEARSTONE
WEALTH MANAGEMENT

Pre-Retirees & Retirees

Planning ahead for retirement can be both exciting and overwhelming. It is also an important "first step" into your rewarding, fulfilling future. For this reason, when you start seeing your retirement date on the horizon you should start planning for your transition. "Have I saved enough?" "Should I take a lump-sum pension?" "What about Social Security and Medicare?" "Should I change my portfolio and, if so, when?" Then, after you've retired and start withdrawing from your investment account(s), you face a new set of financial and emotional challenges.

We provide clients with a comprehensive, "Transition to Retirement Plan" that helps them plan for, enter into and enjoy their retirement. Then, after they have retired, we create an investment plan that gives them confidence in their financial security so that they can enjoy their new, retirement. lifestyle.