BURT WEALTH ADVISORS

ROOTED IN TRADITION, GROWING THROUGH SUCCESS

REACHING RETIREMENT

INTELLIGENT ADVICE AND GREAT SERVICE

All retirement plans have two essential features: an understanding of where you are today and an end goal for where you want to be tomorrow. The trick is the work in between. Start today and put yourself into the best position possible for where you want to be on the day you retire. The work and accomplishments you have achieved thus far are proof you can take on this next challenge.

At Burt Wealth Advisors, we help make this process easier. We work with our clients to prioritize their financial goals and fearlessly meet retirement with peace of mind. Our comprehensive and cohesive process looks at your financial life, utilizing a combination of sound financial planning and strategic investment management. We prepare you for up markets and down markets, always referring back to your values and goals as our guide. The result is a wealth management firm that is uniquely objective and proactive in serving you.

COMMON FINANCIAL QUESTIONS

- Is my portfolio positioned appropriately to meet my goals?
- Are my estate planning documents in order?
- How best do I prioritize my goals to align with retirement?
- How much do I need to save to reach retirement?
- Where and how can I maximize my retirement savings options?
- How do I estimate my spending needs in retirement?
- How do I factor rising health care costs into my retirement plan?
- How will Social Security and Medicare impact me?
- Do I need long-term care insurance?

HOW WE HELP

When you decide to work with Burt Wealth Advisors, we become your partner. We work with you to provide strategy and expertise. Our fiduciary relationship means we put your interest ahead of our own, and you can rest assured that our low client-to-planner ratio means we will deliver personalized service. Our financial plans serve as a road map for your future, stress-tested and personalized, keeping your values and goals at the forefront. In doing so, we serve as an ongoing financial resource for you.

When you work with us, we will:

- Provide focused analysis to address questions about retirement needs
- Offer experience-based savings and investment strategies to fund retirement and other long-term goals, aligning with your risk tolerance
- Develop a savings and spending plan so that you can have fun now and in the future
- Advise you on leaving an inheritance to your children or grandchildren
- Provide management of legacy securities

WHAT YOU RECEIVE

- Access to an advisory team of CERTIFIED FINANCIAL PLANNER™ professionals and experienced Client Service members
- A tailored, volatility-tested financial plan revolving around your needs and goals
- A well-diversified investment strategy that bases recommendations on your risk tolerance and goals
- Annual meetings (more often if desired) to discuss changes and ensure you are still on track
- Quarterly portfolio performance reports accompanied by our assessment of the market over the quarter
- Online account access and unlimited communication with our team
- Coordination with attorneys, CPAs and other trusted advisors
- Individualized and professional reviews of your long-term care planning and Medicare options by a long-term care planning expert
- Objective advice—we are an independent firm that does not sell commission-based products

SERVICES OFFERED

- Investment management
- Financial planning
- Cash flow analysis
- Education funding
- Retirement planning
- Insurance analysis
- Tax planning strategies
- Estate planning review
- Social Security maximization analysis
- Coordination of employer retirement plans with client portfolios
- Access to a Medicare and long-term care expert

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