



ROOTED IN TRADITION, GROWING THROUGH SUCCESS

ENJOY RETIREMENT

INTELLIGENT ADVICE AND GREAT SERVICE

There are few times in life when we get to have our cake and enjoy it too. A well-planned retirement, through the integration of financial planning and investment management, is one of those times. Maximizing your options for retirement income now, while preserving and protecting assets for the future, requires customization, strategy and trust.

To that end, Burt Wealth Advisors places a personal relationship with our clients at the center of each engagement and, from that relationship, helps each client achieve peace of mind in their ideal retirement. Our comprehensive and cohesive process enables us to look at your situation from a multitude of perspectives, bringing your specific retirement income needs and goals into alignment with the financial marketplace. You deserve a plan that has been carefully considered, organized and explained to help ensure that it supports you, and you deserve a wealth management firm that is both objective and proactive in serving you.

COMMON RETIREMENT QUESTIONS

- * Is my portfolio appropriately positioned to meet my needs?
- * How can I maximize my retirement distribution options?
- * Will I outlive my assets?
- * Can I afford my retirement goals?
- * How do I plan for rising health care costs?
- * When and how should I give to charities, family and friends?
- * Are my estate planning documents in order?
- * How will Social Security and Medicare impact me?
- * Do I still need life insurance?
- * Do I need long-term care insurance?

HOW WE HELP

At Burt Wealth Advisors, we begin by developing a complete picture of your financial life. We work with you to identify and prioritize goals, and to build a plan that works for you. 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. We take the time to review the impact of spending habits and financial requirements, as well as advanced considerations such as risk tolerance and personal values. In doing so, we serve as an ongoing financial resource to our clients.

We strive to create peace of mind by taking care to:

- * Analyze and stress-test investment strategies for accomplishing your retirement needs
- * Develop a plan for retirement income and spending to meet your needs and dreams
- * Advise you on leaving an inheritance to your children or grandchildren
- * Utilize tax and estate strategies so that more assets go to your loved ones and valued charities
- * 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 to 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
- * Support system to assist your surviving spouse
- * 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
- * Access to a Medicare and long-term care expert
- * Required minimum distributions management
- * Assistance for surviving spouses

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