

For most of our clients, enjoying their retirement is a main objective in why they choose a relationship with Cambridge Advisors. If retirement is still years away, we can help you see if you are saving enough for the retirement you envision. If you are nearing retirement, we can help you determine when is the best time to retire, what your retirement lifestyle may look like, and which retirement payout options to choose from in your 401k, pension or other retirement plan. If you are already retired, we can help you determine how much income you can comfortably spend and from which sources you should spend first. Our specialized retirement planning services include the following:

- Review and asset allocation recommendation for employer sponsored retirement plans

- Retirement planning projections

- IRA rollovers

- Retirement income planning

- Strategies for meeting retirement goals

For clients who do not meet our investment management minimum, we offer the financial planning on a stand alone basis which would include our retirement planning services.

ATTENTIVE □ □ □ □ □ □ □ □ **TRUSTED** □ □ □ □ □ □ □ □ **ACCESSIBLE**