

YOUR PATH TO RETIREMENT STARTS HERE.



YOU ARE HERE

1

GPS

We assess your current location, understanding where you are today.

2

ROADMAP

We create a structured, personalized plan to get you from where you are to your retirement goals.

3

ARRIVAL PLAN

We ensure all pieces are in place for a successful and stress-free retirement.

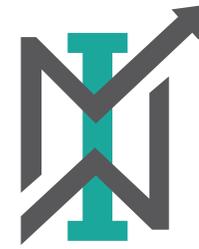


RETIREMENT

IVANOFF
WEALTH MANAGEMENT INC.



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No retirement journey is identical to another. Our Retirement Roadmap process is designed to give you a solid framework for a plan tailored to fit your unique goals and circumstances and keep you on course toward the retirement lifestyle you want.

YOUR ROADMAP TO RETIREMENT BEGINS HERE!



1: GPS

First, we assess your current location, understanding where you are today and where you'd like to land in your retirement. We get to know you by discussing your current financial situation, values, concerns, and long-term vision. This allows us to customize your roadmap to retirement to your specific requirements and sets the foundation for everything that follows.



3. Arrival Plan

Once your Retirement Roadmap is solidified, it's time to put your plan into motion. We carefully monitor your progress and coordinate all the necessary actions – from investment changes to insurance adjustments – so you can spend less time and energy on managing the details on your own and more time enjoying your journey to retirement knowing you have the right professionals in your corner.



2: Retirement Roadmap

We take everything we learned from the GPS step to craft a personalized financial strategy tailored to your needs, timeline, and risk tolerance, with clear steps to help you move forward confidently. Your Retirement Roadmap will include:

- Aligned investment strategy
- Tax-efficient planning
- Retirement income planning
- Social Security and Medicare guidance
- Legacy and estate planning



4. Retirement

It may be the dream destination on your roadmap, but once you finally reach your permanent vacation, we continue to keep a well-trained eye on how your plan performs. We pay careful attention to how it could be affected by any number of changing factors, be it market changes, sudden life events, or a simple shift in your personal goals. We implement regular reviews of your progress, adjust as needed, and stay by your side to help you navigate life's changes with clarity and confidence.