

Whether you're planning for retirement or have already made the transition, one of the biggest concerns is whether your investments will be enough to allow you to live the life you want. Even for the most prolific savers, market volatility, tax liabilities, and poor liquidity can make a significant dent in your retirement outcome.

Fortunately, together we can create a comprehensive plan with strategies like the bucket approach that can help you accumulate assets, plan for immediate income needs, and withdraw funds intelligently to avoid unnecessary tax penalties.

[Learn more.](#)



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