Springstead Allidina Wealth Team

Four Key Client Meetings

1. Personal Planning and Investment Review

Focus: This annual planning meeting focuses on both developing and refining your financial roadmap. By identifying your career stage and retirement timeline, we create adaptive plans for all clients that include Retirement Plans for pre-retirees and Retirement Income Plans for retirees looking to generate retirement cashflow.

Benefit: Proper planning during all stages of your life provides the framework from which we can develop a customized investment plan.

2. Retirement Income & Tax Planning Review

Focus: Specially designed meeting to review:

- ✓ Tax deductions, credits, income-splitting, and tax shelter opportunities to help you minimize current and future tax liabilities.
- ✓ The proper structure of your investments to reduce tax implications and potential clawbacks of government pensions.
- ✓ Tax minimization strategies for your estate.

Benefit: Helps you save tax both now and in the future through long-term tax planning.

3. Estate, Insurance and Retirement Lifestyle Review

Focus: Discover and prioritize your various non-investment considerations, specifically:

- Developing an effective Estate Plan to ensure your affairs are properly structured for your beneficiaries.
- A review of your contingency plans that will provide for loved ones in case of accident, disability, or critical illness.

Benefit: Protects your beneficiaries and provides for a smooth estate transition.

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4. Retirement Lifestyle Planning

Focus: A vital meeting catered specifically to pre-retirees and retirees that focuses on planning for the physical, mental, social, and emotional side of retirement.

By identifying and managing the expectations of retirement, we aim to equip you with the tools to face the various transitional challenges.

Benefit: With resources made available from Next Chapter Lifestyle Advisors, we focus on planning for the physical, mental, social, and emotional side of retirement. Our goal is to align you for a seamless, sustainable, and enjoyable transition to your next chapter.

Additional: Frequent Portfolio Reviews

Focus: In addition to the four key client meetings, we schedule regular meetings that focus solely on reviewing and making personalized recommendations for your investment portfolio.

Benefit: As a team, we ensure that your investment portfolio stays in line with your plan and objectives while accounting for major life changes and new goals.

THE
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WEALTH TEAM