The Wealth On Purpose PROCESS

RWD RETIREMENT WEALTH DESIGN

Financial Planning That's Intentional, Personalized, and Built to Last

You've worked hard for your money. Now, it's time for your money to start working for you. Our **Wealth on Purpose Process** is designed to help you make confident, well-informed decisions about your financial future — with every dollar serving a clear purpose aligned to your life goals.

Whether you're approaching retirement or already retired, we'll work together to create a custom financial roadmap that supports the lifestyle you've earned, helps minimize taxes, and protects your legacy.

What You Can Expect

This isn't a cookie-cutter plan. This is about you. Your values. Your goals. Your ideal future.

We start with a relaxed conversation — no paperwork required, no pressure, and no need to have it all figured out ahead of time. We'll ask questions that help uncover what really matters to you. From there, we'll guide you through a personalized step-by-step process built around clarity, confidence, and long-term peace of mind.

Our 5-Step Planning Process

1. **Discovery Meeting – Complimentary & Casual**: Let's get to know each other. We'll talk about your current financial picture, your goals, and what "success" looks like for your retirement. We'll also explain how we work, and if it feels like a good fit, we'll outline any fees and what comes next.

2. **Assessment & Preliminary Planning:** We'll take a deep dive into your financial data and provide a clear, personalized analysis. We'll show you how your current strategy aligns (or doesn't) with your long-term goals — and suggest specific opportunities to improve. No guesswork. Just clarity.

3. **Custom Plan Implementation**: Once your accounts are ready, we'll implement your tailored strategy — making sure every dollar is invested with intention. You'll leave this meeting with a clear, easy-to-understand plan designed specifically for you.

4. **Follow-Up & Onboarding**: About a month after implementation, we'll reconnect to make sure everything's in place. We'll review next steps, ensure you can access your accounts, and establish your ideal communication rhythm.

5. **Ongoing Support & Reviews**: Your plan isn't static — and neither is life. We'll continue to meet regularly to adjust your plan as your needs and the markets evolve. Whether formal or informal, these check-ins keep your strategy sharp and your confidence high.

What's Included In Your Wealth On Purpose Plan

Purpose-Driven Goal Planning

We define what your money is for — from monthly income to travel, gifting, or leaving a legacy — and design your plan accordingly.

Retirement Income Strategy

We map out where your income will come from, how long it will last, and how to stretch every dollar — so you can retire with peace of mind.

Personalized Investment Management

No one-size-fits-all portfolios here. We align your investments with your life goals, using strategies designed for both growth and protection.

Forward-Looking Tax Planning

We help reduce your lifetime tax bill — working with your CPA to identify smart moves today that can save you significantly down the road.

Healthcare & Long-Term Care Planning

We plan ahead for rising healthcare costs and future care needs — so unexpected expenses don't derail your retirement.

Estate & Legacy Planning

We help ensure more of your money goes to your loved ones, not the IRS. We'll coordinate with legal professionals and simplify the estate process for you.

Ready To Get Started?

There's no obligation, and no pressure — just a conversation focused on what matters to you.

Let's schedule your complimentary consultation today and begin building your retirement with purpose.

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