



Pre-Retirement Consulting

We all want to feel good about our finances, yet the reality is that money can be one of the greatest stressors in our lives, especially when approaching retirement.

Whether you're still on the path to financial freedom or you need sophisticated wealth solutions to match your unique needs, you deserve to feel in charge of your finances and comfortable knowing your money is working for you.

What should you consider?

Have you evaluated Social Security options as well as Medicare?



Are your investments misaligned with your plan or risk tolerance?



Do you have insurance but don't know how it fits with your plan?



Do you need an advisor helping you achieve your goals and objectives?



OneDigital's team of independent wealth advisers will provide a holistic review of your financial plan. We help develop a financial plan to give you insight to how you turn your retirement account into an income plan during retirement.



STEP 1

We get to know you, your goals, and your objectives. Understanding where you are and where you want to be is how we craft a plan specific to you and your family.



STEP 2

We look at your existing plan to see how everything fits together to serve your goals. This helps us determine what might be missing.



STEP 3

We provide an analysis and recommendations to guide you to a more confident financial future

Contact us for a Pre-Retirement Review

Keith Huber, CFP®

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