SHP Financial Celebrates over 16 Years Of Providing Personalized And Professional Financial Planning Services

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Plymouth, Massachusetts based SHP Financial is pleased to announce that they are celebrating over 16 years of providing independent retirement and financial planning services devoted to the conservation of assets and generation of lifetime income.

As noted on the company?s website, Matthew Peck, Derek Gregoire, and Keith Ellis co-founded SHF Financial in 2003 with a mission to provide comprehensive and unbiased advice to those who wish to build and preserve their nest egg, as well as diversify their investment instruments. ?We are a friendly face that provides a breath of fresh air to a world full of data and numbers. With years of experience in the field of investing and wealth management, we can give you clarity and confidence as you embark on the next chapter of your journey,? says Gregorie.

SHP Financial is an independent financial advisory firm that helps retirees maintain their quality of life and financial stability throughout their retirement years. As an advisory firm, they specialize in formulating the best strategies to help people realize their retirement objectives without forcing their investments into a cookie cutter portfolio. The company explains that they are an independent entity that does not work for a brokerage or a bank, allowing them to freely utilize their own strategies on remaining financially secure in any economy. Their LinkedIn profile can be found here: https://www.linkedin.com/company/shp-financial.

?Unlike many other financial planners, we see retirement planning not as a one time event, but as a journey we?ll take with you for the rest of your life. We believe it?s critical to personally get to know each client, from their financial situation, to their health and lifestyle, as well their dreams and goals for retirement. With this vital information, we begin to implement the 5-Step SHP Retirement Road Map process,? says Gregorie. He elaborated that this process is a customized plan designed to help their clients comfortably get through their retirement by focusing on five key areas, including income planning, investment planning, tax planning, health care planning, and legacy planning.

SHP begins by evaluating the client?s current income situation and expenses to ensure that they have maximized their social security. The firm looks into their client?s pension options and decisions, and plans for a premature death of spouse, inflation, and other factors that may affect their client?s income. Secondly, depending on the client?s risk tolerance, SHP creates diversified investment portfolios that are customized to meet their client?s goals. The firm points out that they are able to offer a wide range of funds and equities to create cost-efficient and quality investment portfolios.

Next, SHP implements a tax planning process to generate more tax diversification. This means that SHP assesses the client's current tax liability (income taxes, capital gains taxes,
estate taxes, etc.) and develops strategies that can legally minimize the taxes that they need to pay during their retirement years, as well as when passing their wealth to the next generation. In addition, the company also understands that the healthcare system can be overwhelming drain on fianances. "Whether you are trying to retire before Medicare, on Medicare, or are concerned about the high costs of Long-Term Care, we take the time to ensure that you know your options, and create a plan that matches your health and budget," Gregorie affirmed. Finally, he states that SHP works collaboratively with estate planning attorneys to help maximize the amount of their client's inheritance, control how the money will be given to the heirs, and minimize the taxes that need to be paid in the process.

SHP Financial is considered one of the most reliable financial services provider in Plymouth and the surrounding areas, as illustrated by their A+ rating at https://www.bbb.org/us/ma/plymouth/profile/insurance-services-office/shp-financial-llc-0021-37556. They also receive a number of positive reviews and recommendations from many of their clients.

One such client, Bianca S., says, ?I have used SHP Financial to buy structured settlements (annuities) and they have some of the best rates in the market. You can also get a weekly email subscription to view the current offers. They will meet you at your home or their office to answer all of your questions. They also have a team of professional financial advisors and staff who will give you timely advice. Highly recommended.?

More information can be found on the company?s website. Alternatively, interested parties may call the firm?s service hotline or connect with SHP through their official Facebook page to learn more about their latest news and important announcements.

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For more information about SHP Financial , contact the company here:SHP Financial Derek Gregoire15087462400ask@shpne.comSHP Financial 225 Water St #210, Plymouth, MA 02360

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At SHP Financial, we pride ourselves on helping our clients reach their target for retirement planning. With our investment and portfolio management services, we take the guesswork out of retirement planning.

Website: https://www.youtube.com/channel/UCQZ5WhKtCl9c9R4Lq4kESfA

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