SHP Financial Offers Retirement Planning Road Map 5 Step Success System

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SHP Financial, based in Plymouth, Massachusetts, has announced that they are offering the SHP Retirement Road Map®, which is composed of five steps. These five steps that lead towards success in retirement planning are income planning, investment planning, tax planning, healthcare planning, and legacy planning. More information about the retirement planning process at SHP Financial is provided at goldstonefinancialgroup.com/shp-financial.

Derek Gregoire, co-founder of SHP Financial, says, ?On your Retirement Road Map®, we?ll evaluate your current income situation and expenses to ensure they are sustainable for your life. Next, we?ll make sure that we have maximized your social security, looked into your pension options and decisions, planned for a pre-mature death of a spouse, inflation, and other considerations that are critical for your income plan This is the first step towards success in retirement planning.?

Meanwhile, SHP founders Matthew Peck and Derek Gregoire have published their June 6, 2019 podcast at retirementroadmap.podomatic.com. In this podcast, Matthew and Derek discuss the most common questions that they find themselves answering almost everyday, whether it is during one of their public workshops or during a first visit to a client. After that, the SHP founders welcome back Attorney Keith McManus from McManus Estate Planning. Attorney McManus? focus is on the value of knowing whether a person?s estate plan is up to date and how to determine if it is not. After that, in the SHP Story Segment, Derek and Matthew share some stories of clients and the impact of volatility on them. Finally, because it is graduation season, the SHP founders offer some advice and provide some financial tips for recent college graduates.

In a previous podcast, SHP founders Derek Gregoire, Keith Ellis, and Matthew Peck discussed the various steps of the SHP Retirement Road Map®, taking the listeners through the five steps of income planning, investment planning, tax planning, health care planning, and legacy planning.

In investment planning, SHP Financial will create portfolios that are tailor-fitted to the overall financial goal of the client, depending on the client?s risk capacity and risk tolerance. They want to point out that because they are an independent Registered Investment Advisor, they can offer a wide range of funds an equities to create high quality and cost-efficient portfolios because they are not tied in with a huge ?wire house? institution.

With regards to tax planning, SHP Financial will assess the client?s tax liability and come up with strategies to minimize the taxes that the client has to pay during retirement, as well as when passing on the wealth to the next generation. On healthcare planning, whether the client is trying to retire before Medicare, on Medicare, or concerned with the high costs of long-term care, the company will make sure that client is aware of all possible alternatives, and develop a plan that matches the client?s health and budget.

And finally, for legacy planning, SHP Financial will work with estate planning lawyers so they can optimize the amount that the client?s loved ones will be able to inherit, help control how the money is provided to the heirs, and minimize the amount of taxes that will need to be paid.

One of the reviews of SHP Financial as a company to work for can be found at glassdoor.com/Reviews/SHP-Financial-Reviews-E2281019.htm, where a current employee provided a five star rating and has mostly positive things to say about the company. He says, ?SHP is constantly growing - but at the same time maintains their small "family feel" for all employees. The owners take pride in knowing each of their employees and always making sure that everyone feels challenged and fulfilled in their career! [...] SHP takes really great care of their employees!? With regards to the cons of working at SHP Financial, the employee can only point out to the fast paced and stressful work, which he admits is common in the finance industry.

Those who need more information about SHP Financial can visit their website, call them on the phone, or contact them via email.
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SHP Financial

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.

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