



## **North Shore Retirement Advisors Addresses Major Social Security and Tax Changes Affecting Retirees**

*March 03, 2026*

STONEHAM, MA - March 03, 2026 - PRESSADVANTAGE -

North Shore Retirement Advisors, a Massachusetts-based financial services firm, is helping clients navigate significant changes in Social Security benefits and new tax strategies that will impact retirement planning in 2025 and beyond.

The company reports increased client interest in retirement income solutions as regulatory changes and new investment strategies reshape the retirement landscape. Among the most significant developments are five major Social Security adjustments scheduled for 2026 that could affect benefit calculations and Medicare premiums, along with innovative tax strategies now available through investment companies offering to cover taxes on Roth conversions.

"The retirement planning environment is experiencing substantial shifts that require immediate attention from both current and future retirees," said Jeff Dragon, senior advisor at North Shore Retirement Advisors. "We're seeing unprecedented changes in how Social Security benefits will be calculated and administered, particularly regarding Medicare fee structures that could significantly impact retirees' monthly budgets starting in 2026."

The firm has identified several critical areas where retirees need updated guidance. Social Security modifications set to take effect in 2026 include adjustments to cost-of-living calculations, changes in earnings limits for those still working, modifications to spousal benefit rules, updates to disability benefit transitions, and notably higher Medicare Part B and Part D premiums that will reduce net Social Security payments for many beneficiaries.

Additionally, North Shore Retirement Advisors is educating clients about new opportunities in Roth conversion strategies. Several major investment companies have begun offering programs where they absorb the tax liability associated with converting traditional retirement accounts to Roth IRAs, potentially saving retirees thousands of dollars in conversion costs.

The company specializes in comprehensive retirement planning services including Social Security optimization, Medicare guidance, tax strategy planning, IRA and 401k rollovers, risk evaluation, long-term care planning, life insurance, and annuities. Their approach focuses on protecting retirement assets while helping clients navigate complex regulatory changes.

"The introduction of investment company-sponsored tax coverage for Roth conversions represents a paradigm shift in retirement planning," Dragon noted. "Combined with the upcoming Social Security changes, retirees need professional guidance more than ever to optimize their retirement income and avoid costly mistakes."

North Shore Retirement Advisors emphasizes the importance of proactive planning, particularly for those approaching retirement or recently retired. The firm notes that understanding these changes now allows retirees to adjust their strategies before the modifications take effect, potentially preserving thousands of dollars in retirement income.

For comprehensive retirement planning resources and updates on regulatory changes affecting retirees, individuals can visit <https://yourretirementhelp.com> for additional information.

North Shore Retirement, Inc. is a financial services company based in Stoneham, Massachusetts, specializing in retirement planning for individuals nearing or already in retirement. The firm provides personalized strategies to help clients protect their retirement assets and achieve financial security through comprehensive planning services including Social Security optimization, Medicare guidance, tax planning, and investment management.

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## **NORTH SHORE RETIREMENT ADVISORS**

*We are financial advisors specializing in retirement planning since 1988.. Our expertise is helping investors derive an income from their financial assets to enjoy a comfortable retirement while leaving a legacy for their loved ones.*

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