Measured Wealth

Building Legacies, Securing Futures

Ever sit up at night wondering...

Do I have enough money?
How diversified am I?
Is my portfolio aligned with my CURRENT f inancial objectives? How does this change as I move into retirement?
What does risk & volatility really mean? How does it apply to me?
How much money do I need?
How much income will my portfolio generate? Does inflation really matter?

Our financial experts take the complexities out of planning your financial future. We work with you to develop a plan that thoughtfully prioritizes your goals and provides solutions, so you can live the financial life you want. No more stressing about your financial future. Understanding your short and long term goals is our number one priority for fostering a strong relationship. Our advisors take what's truly important to you, implement it with personalized financial advice, track your progress overtime, and re-evaluate when necessary.

Your financial goals can be short-term like saving for a family vacation to long-term like college or retirement.

Every milestone you hit along the way will grow your financial future.

Building Financial Confidence

For investors with $500k or more, we provide a no- obligation analysis to make sure your portfolio is in alignment with your current goals.

This review will combine all portfolio metrics necessary for an extensive look at the big picture. It includes but is not limited to beta, sharpe ratio, standard deviation analysis to name a few.

We will break this data down so you can easily understand the path we plan to take. We understand that a successful client advisor relationship begins with transparency and trust. That's why, getting on the same page is so imperative.

Key Financial Concepts

We also assist in answering the many common questions clients have regarding key concepts like **income, volatility and inflation.**

We will educate our clients on those key concepts...

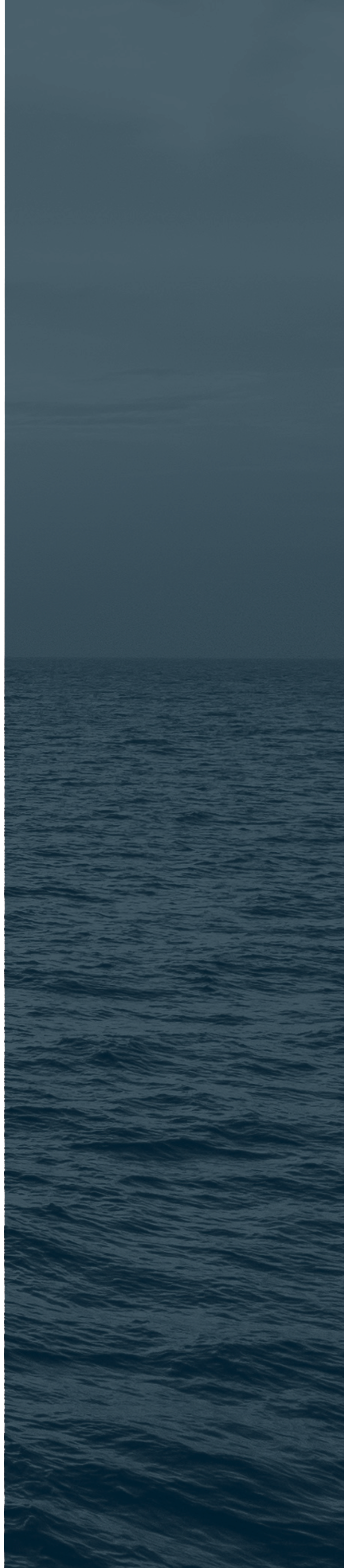
We will show our clients the steps to generate the income they need to cover their essential expenses and ensure their lifestyle remains the same after retirement.

- **What kind of lifestyle do you want to have after retirement?**
- **What's going to change? What can stay the same?**
- **How much saving is enough?**

Time is on your side:

We will also educate and cover accumulation. Time will benefit you in the long run if you know how to leverage it. Starting your financial journey today will ultimately be tomorrow's gain.

Accumulation and Distribution are very different things. It surprises many retirees that distributing their accumulated retirement savings as income requires inherently different strategies than saving it did.



Ask | What's one of the most comprehensive reviews you have ever experienced?

Your Family Comes First

From here we will review any annuities, life insurance, long term disability, medicare supplement policies that you may have.

We know you and your family come first. That's why we make sure you and your family are set up for the future.

Being prepared for the unexpected is a safety net for your family. We don't want something unplanned to derail your financial goals completely.

It's nice to blow the dust off old policies and revisit the benefits they provide. Because we plan to assess your long-term goals, it is always good to check-in and update them to support every chapter of your life.

We are your advocate every step of the way.

Taxes, taxes, and more taxes.

As part of our holistic review, we can have one of our strategic partners review your most recent tax return to see if there is anything that jumps off the page for potential tax savings.

Ready to Get Building?

If this isn’t enough, we will provide an abbreviated financial plan to see if your boat is pointed in the right direction so you can sail into the sunset.

Measured Wealth

CALL US TODAY

Portsmouth | NH | 603-431-1444
Lauderdale By The Sea | FL | 603-431-1444

WWW.MEASUREDWEALTH.COM