LIVING YOUR BEST LIFE

Whether you're just setting out on life's journey or planning your retirement, you have goals and dreams.

STRATOS WEALTH PARTNERS

LET US HELP YOU LIVE YOUR BEST LIFE WITH A HOLISTIC APPROACH TO PLANNING

OUR APPROACH

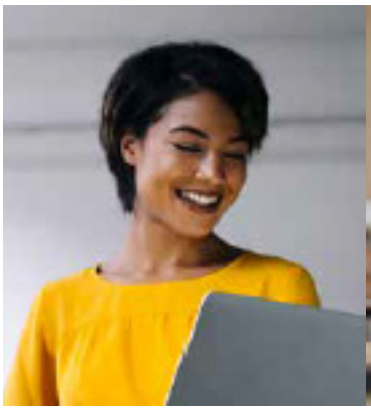
We use a client-centric process focused on pursuing specific milestones we create together. Our comprehensive process is designed to help identify your needs, implement your strategy, and monitor it to help you stay on course.

DISCOVERY

We begin by talking about the things that are most important to you—family, hobbies, community, work life, etc. We'll ask a lot of questions about what you're feeling, thinking, worried about, and hoping for. We'll examine your experiences with money and what you've accomplished so far. All of this helps us gain a deep understanding of your financial situation and your goals.

PLANNING

Based on what we learn, we'll assess your unique situation, gauge where you are now relative to your goals and priorities, and begin the process of filling in the gaps. We'll prepare an analysis of your finances, develop customized strategies, and offer recommendations for a framework to address your future needs and desires.



LIFE MILESTONES

We'll craft a plan based on your stage in life.

FIRST JOB

- Fund a retirement account: 401(k) or Individual Retirement Account (IRA)
- Get a credit card

MARRIAGE

- Purchase first home
- Buy disability insurance
- Diversify your portfolio

CHILDREN

- Develop a college savings plan
- Purchase life insurance
- Create a basic estate plan

CHANGING JOBS/ DIVORCE/REMARRY

- Assess 401(k) options
- Refinance or obtain a new mortgage
- Update your will/trust/ powers of attorney

RETIRING PARENTS/ ELDER CARE

- Explore assisted living options
- Develop a Comprehensive estate plan
- Ensure retirement income

SOLUTIONS

One benefit of holistic planning is that it offers a comprehensive view of all areas of your financial life. We'll offer specific solutions and help you choose the tools (stocks, bonds, mutual funds, insurance, etc.) to address each of your specific goals. We'll help develop and implement an action plan and get started.

MONITORING

When you make plans, life often gets in the way. That's why it's important to monitor your plan and incorporate tracking to ensure it remains on target. We'll help you plan for the unexpected, anticipate change, and adjust your plans over time, if necessary.

CHILDREN LEAVE FOR COLLEGE / RETIREMENT PLANNING

- Develop a retirement plan
- Finance college education
- Diversify your portfolio

RETIRING PARENTS/ ELDER CARE

- Explore assisted living options
- Develop a Comprehensive estate plan
- Ensure retirement income

LEGACY PLANNING

- Transfer assets to beneficiaries
- Purchase a second home
- Diversify your portfolio

EARLY RETIREMENT

- Develop an advanced estate plan
- Establish a retirement income distribution strategy
- Explore charitable giving

LATE RETIREMENT

- Update will or estate plan
- Take IRA required minimum distributions at age 70½.
- Manage medical expenses
- Make assisted living plans

We believe adopting a holistic planning approach that focuses primarily on your life goals and aspirations may improve the chances of achieving the future you envision. Such a disciplined planning process can help you eliminate debt, better understand the financial decisions that support your situation, and improve family communication regarding money issues. Your vision for the rest of your life might involve adventurous travel or passions after pursuing a career or raising a family. Maybe you're already living your best life, but thinking about your legacy.

Living your best life is a journey—a process we'll undertake together. By helping you articulate your aspirations, we're better able to understand where you want to be and develop a road map to help you get there. Whatever your hopes for the future, you will need to commit to a plan that can take you there.

But planning doesn't stop there. Your dreams, goals, and circumstances can change throughout your life. We'll be there to provide guidance, monitor your progress, and help keep your plan on track with your goals.

Call us today. Together we'll chart a path to your future.

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