



A PREFERRED BENEFITS PROVIDER for:



AFT-MASSACHUSETTS

A FOCUS ON RETIREMENT READINESS

Our specialty:

We have counseled hundreds of K-12 educators to help them better understand and manage their retirement benefits. Our intimate knowledge of the Massachusetts, New Hampshire, and Boston Retirement Systems and available 403(b)/TSA/457 options allows us to help our clients make informed financial choices and develop effective

Focused on Educators

- Serving K-12 and Higher Education.
- Expertise in regional retirement systems, 403(b) and 457 plans.

Independence

- Free from pressures of proprietary products
- Free to act solely in your best interest.

Broad Spectrum of Services

- Full financial services through our affiliation with Commonwealth Financial Network.

strategies as they plan their retirements. *We are here to help you navigate the complexities of these retirement plan arrangements and optimize their contribution towards your personal financial goals.*

Anytime is a good time to start working with us: Our process



Contact us:
(888) 535-8989

Initial meeting or call to review your situation

Discover and implement strategies to accomplish your financial goals.

Periodic review and modifications as needed



Let's Get Started.
Call me at **888-535-8989**
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