

## Solutions & Resources: Retirement Planning Services

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At Domani Wealth, we strive to see tomorrow the way you do. That's why we start each conversation by asking, "What does your tomorrow look like?"

To answer that, we've compiled some thoughtful questions to help you plan for the future and to gain insight on the services and experience we offer as an independent wealth advisory firm. Because at Domani Wealth, our focus is to lead you to a tomorrow filled with possibilities.

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### Will your finances be "retirement ready"?

Your ability to live the lifestyle you want in retirement depends on a variety of factors. You will need to manage those factors as well as implement effective strategies that will put you on the path toward a successful financial future.

The Domani Wealth team offers the experience to help you strategically and objectively plan your retirement. We will initiate a discussion with you about your goals for retirement and how they fit into your larger financial picture.

Once our team understands your retirement vision, we will help you develop a realistic comprehensive financial strategy that factors in

- Current assets and liabilities
- Current and projected savings
- Anticipated cash flow needs
- Tax implications
- Forecasted investment returns, risk factors, and inflation
- Other potential opportunities

At Domani Wealth, your retirement plan never goes on autopilot. We will periodically

- Meet with you to review your plan and ensure it continues to reflect your goals
- Make unbiased recommendations regarding savings tools
- Assess investments to make sure they are still contributing to your retirement goals
- Revise your retirement strategy, when needed, to reflect changes in your personal or financial situation or the economic environment

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**Take control of your tomorrow by planning for retirement today.**



Let the Domani Wealth team walk with you every step of the way to help transform your retirement vision into a reality.

## **IMPORTANT DISCLOSURE INFORMATION**

Past performance may not be indicative of future results and different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy (including the investments and/ or investment strategies recommended and/or undertaken by Domani Wealth, LLC), advice, or any non-investment related services, will be profitable, equal any historical performance level(s), be suitable for your portfolio or individual situation, provide security or prove successful. Domani Wealth is neither a law firm nor accounting firm, and no portion of its services should be construed as legal or accounting advice.

Please remember that it remains your responsibility to advise Domani Wealth, in writing, if there are any changes in your personal/ financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, or if you would like to impose, add, or to modify any reasonable restrictions to our investment advisory services.

The scope of the services provided depends upon the needs of the client and the terms of the engagement.