

CORE Retirement Engineering Process



Education

We begin with empowerment through education. CORE workshops lay the foundation for understanding WHY and HOW certain strategies may be used to achieve a truly comfortable retirement plan.



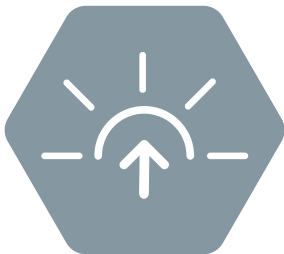
Discovery

We engage in interactive discussions to identify potential income needs and current assets. Specific goals are targeted to help develop a Retirement Blueprint based on your unique situation.



Design

We then create a custom plan based on your Discovery phase. Utilizing state of the art financial planning software. Components are entered, by you, into your CORE Retirement Blueprint, ultimately creating a comprehensive guide to achieving your goals.



Deploy

You have methodically addressed all your retirement concerns up to this point, helping to avoid reactive and emotional investment decision making. Now it's time to put your plan in action.



Review

CORE is predicated on discipline and the understanding that retirement is a 20-30 year endeavor. Markets will go through cycles over time, and proper retirement planning never stops. CORE promotes the constant monitoring of your retirement investments.



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