



Helping You Determine The Best Way To Claim Your Social Security For Maximum Income Efficiency

You are facing one of the biggest decisions of your retired life; when best to claim your social security and how.

You have so many questions, so you Google for answers, only to find that you are now more confused about it then before, so much conflicting information!

One of the reasons it can be confusing is because there is no one best answer for everyone. The best choice is the one that is right for YOU. Social security is not a stand-alone component to your retirement income plan.

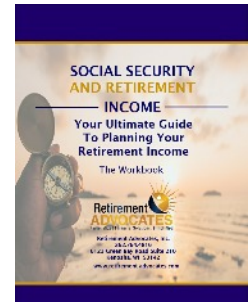
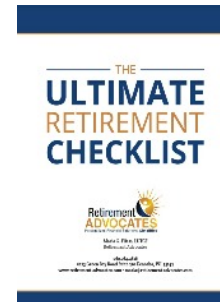


When and how you take it will have implications on the rest of your retirement assets in multiple ways, affecting everything from accumulation to taxation. Everything needs to work together.

This service package is a comprehensive walk-through regarding all things social security, and then focused down to examine how it all pertains to YOU. We provide a personal approach that gives you both a birds-eye view and detailed information in order to help you make the best possible decision of what to do.

The Social Security Sherpa™ service package includes:

- Complimentary consultations - could be one two or three - we meet until we are done.
- A social security checklist and timeline that helps you with filing and important dates
- A full social security report with information pertaining to your situation and different options for claiming
- Help with spousal, widowed or divorced claiming strategies
- What to know when it comes time to claim.
- Most importantly, how will your income look over time with different claiming strategies - a complete birds-eye view of your situation
- Help with accessing your social security statement online if needed.



Our goal is to help you make this process as stress-free as possible - and help you make more informed Social Security decisions. Schedule your meeting today! Ask for a Social Security Sherpa™ appointment!