



Roadmap to Retirement



Roadmap to Retirement is a step-by-step retirement planning process:

Create a Customized *Retirement Income Plan*



Evaluate *Tax Reduction Strategies*



Create a *Personalized Investment Strategy*



Explore Alternate *Asset Wealth Protection*



Develop a *Legacy Plan: Estate Planning & Legal Work*



Elect a Long Term Care & Life Insurance Strategy



Select the Route that Works Best for You.

01

**Financial Planning
ONLY: One-Time fee**

Roadmap to Retirement
Financial Review

\$1,000

02

**Advisory Client
\$250,000+**

Roadmap to Retirement
**Financial Review
included FREE**

Investment Advisory Services are offered through Odiorne Point Asset Management, LLC, a registered investment adviser. Insurance products and services are offered and sold through individually licensed and appointed agents in all appropriate jurisdictions.

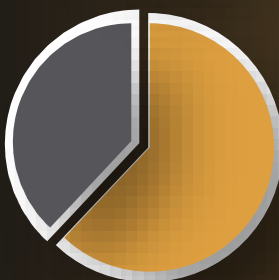
Licensed Insurance Professional. Investing involves risk, including the possible loss of principal. Insurance Company products are backed by the financial strength and claims paying ability of the issuing company. We are not affiliated with any government agency.



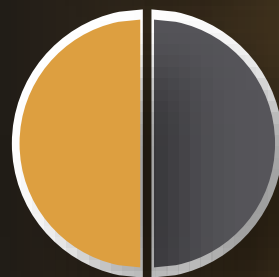
Advisory Client



Tactical:
BEST ASSET TODAY



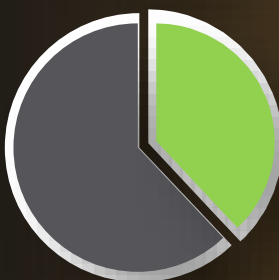
Conservative




Moderate




Growth



FIA

 Fixed Income

 Equities

Asset Management

.75-1.25% of AUM per year



No Commissions



No Trading Fees



Annual Reviews &
additional reviews per
request.


Our *Roadmap to Retirement* process integrates Tax Reduction, Custom Asset Management and Estate Planning to create a comprehensive retirement plan.


Our investment process targets superior returns with less risk than traditional IRA or 401k investment choices.

We coordinate your tax reduction, investment and estate decisions so you can enjoy your retirement years more comfortably.

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Schedule an Appointment:

For your convenience we do
virtual appointments.

<https://calendly.com/roadmap-to-retirement>

