

Why Should You Want A Retirement Success Advocate?



You Didn't
Get Here—
Just to Get
Here!

CONGRATULATIONS!

You have worked long and hard and earned the right to begin your next chapter in life. Whether that is a traditional retirement where your working days are over or some other plan of action, your life does not stop when you reach that retirement pinnacle—the journey simply continues in a different way.

Now You Start Your Own In-Retirement Adventure! Where Does Your Road Lead?



Because your journey continues past your retirement date, you would benefit from having a professional guide to help you during the adventure.

You may have worked with a financial advisor during your working years who specialized in helping clients invest and plan for getting to retirement. That advisor has a different perspective than a holistic retirement-focused advisor who takes a broad view of the many issues facing clients making this major life transition.

The word Advocate is derived from the Latin *advocare*, to “add” a “voice.” To advocate is to add a voice of support to a cause or person.

Your **Safe Harbor Retirement Success Advocate** is your supporter as you plan for and achieve your retirement goals. Unlike a traditional financial advisor, we view your investment portfolio as just one of many important financial issues to be addressed—and coordinated.

What Makes Safe Harbor's Retirement Advocacy Program Different?

A typical pre-retirement financial advisor is narrowly focused on managing and building up your investment portfolio to achieve your financial goals, including retirement.

This may have been very appropriate for your needs during your working and saving years, but your situation is about to (or already has) change rapidly.



In contrast to the typical approach in your working and saving years, the integrated and holistic approach of a **Safe Harbor Retirement Success Advocate** takes a “wide-screen” view of a client’s personal financial situation. There is a lot more to it than just your investment holdings!



Our shared goal is your financial independence and enjoyment of your retirement years. Find out what a Retirement Success Advocate can do for you by contacting Safe Harbor.

