Retirement & the Day After

We can help you prepare for today, tomorrow, and

The Day After

Have you been wondering...

- If your savings are enough to support you and your family while still meeting your goals?
- How would economic and geopolitical changes affect your portfolio returns?
- If your retirement savings are properly anchored and protected?
- How your wealth will survive future catastrophic events similar to the Great Financial Crisis and the Covid-19 Pandemic?
- How the ongoing policy changes will affect the portfolio holdings and your balances?

ESTABLISH RETIREMENT GOALS

We will start by working with you to set up wholistic, realistic, and optimistic targets for your retirement goals.

DEVELOP A CUSTOMIZED PLAN

Based on your goals, we will tailor-make an investment plan that best fits your needs.

IMPLEMENT YOUR PLAN

Once we have developed a plan, we continue to work with you to make sure we are meeting your goals.

RETIREMENT & THE DAY AFTER

BLACKSUMMIT FINANCIAL GROUP

HAVE YOU THOUGHT OF RETIREMENT?

Retirement planning should not be stressful. Let us be your financial steward that walks alongside you in your retirement journey. BlackSummit can help you prepare for today, tomorrow, and the day after.

WHAT WE CAN OFFER YOU

THE BLACKSUMMIT ADVANTAGE

We believe that a good steward is the key to a productive society, so we offer transparent, disciplined, and respectful boutique-style asset management. Our goal is simple: To preserve and grow your wealth based on your goals for retirement. You decide what the benchmark for success should be based upon your distinct circumstances. To accomplish this, our team brings a unique approach shaped by a deep understanding of the market's underlying economics, informed by decades of experience.

"In this world nothing can be said to be certain, except death and taxes." – Benjamin Franklin

If these are life's only two inevitables, then it would be prudent to plan for both. For this reason, we offer estate planning and tax strategy services along with our asset management.

ESTATE PLANNING

We will lead you toward curating the best directives and controls for your future estate. This entails putting together a clear written will, designating responsibilities for carrying it out, and appointing who can make medical care decisions on your behalf if you are incapable to do so. We can also make plans to transfer your estate out of life insurance policies or IRAs and into the hands you desire.

TAX STRATEGY

There is one thing that can make or break your retirement planning: taxes. Some people believe that in retirement you'll be able to live off less, but in reality, your expenses just change, and withdrawals are taxable. We can guide you to the best tax-advantaged accounts to make sure you win the tax battle of retirement.

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