

Step 1: The Strategic Income Projector

When can I afford to retire?

If retired, how much can I spend?

These are our clients' most commonly asked questions and obviously important; the answers to which depends greatly on the level of retirement income they feel they need.

In this step, we complete a detailed projection of your savings, income flows and spending over your lifetime, taking into account inflation, taxes and other critical data, to ensure your retirement is affordable. For business owners, we help assess how much you need to receive from the sale of your business.

Once completed, we 'stress-test' the Projection to account for a possible early death or disability, making sure your plan is secure.