

After establishing a command of your current situation we are able to concentrate on realistic goals. Knowing how much you are spending today offers some guidance on how much you might need in retirement to live an enjoyable lifestyle.

Your goals need to be achievable, and an important element developing achievable goals is to study your investor psychology. If your goals require a 10% return but you're willing to take only 7% worth of risk then we need to reconcile that gap. Goals will be set for all of areas of your personal profile like: retirement projections, college savings, estate planning and insurance.