



EXPEDITION RETIREMENT

Comprehensive Retirement Planning

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MISSION

To ensure current and future retirees the peace of mind of a comprehensive retirement plan.

EDUCATING AND EMPOWERING

For current and future retirees, Expedition Retirement is the Comprehensive Retirement Planning company that provides non-biased education to interested parties. Expedition Retirement delivers peace of mind in retirement for the transitional market. Only Expedition Retirement is able to offer a custom, comprehensive, personal and easily transferable Roadmap to the Expedition that is Retirement for its clients.

INDIVIDUALIZED CARE

Knowing that no two households or individuals are the same, we work with each individual to make sure their retirement strategy fits their personal and household needs. We enjoy the relationships we are able to build with our clients while offering personalized service.

FOUR CORNERSTONES

SOCIAL SECURITY AND RETIREMENT INCOME

Many factors need to be taken into account when determining when to file for social security. We help devise a strategy that will maximize income and minimize taxation by exploring income streams that never end, and cannot be effected by market downturns. Our process takes a look at income and expenses in retirement and developing a retirement income strategy to meet expenses and minimize taxation.

SAFE ASSET STRATEGIES

We utilize a team of investment professionals to ensure the best investment strategy is being used for each individual situation and retirement goals.

MEDICARE

Medicare can be confusing and overwhelming! We want you to be able to make a well informed decision. We start by educating on the four different parts of Medicare. Then, using our knowledge and expertise as independent agents, assist in choosing the best Medicare products to suit your needs.

FINAL STAGES

Applying for state Medicaid help is a reality that many households in retirement face. Our strategies help fund/preserve the estate given the possibility of nursing care, or at a minimum ensure that there are funds designated to cover funeral costs.

YOUR RETIREMENT COMPASS

We have learned that the overwhelming priority of our client base is to execute a retirement strategy that allows for peace of mind. We make this a reality by equipping our clients with an individual, customized Retirement Roadmap. There is a place built in to the Retirement Roadmap for all areas of your Comprehensive Retirement Plan.

Retirement, Simplified.