

The Retirement & Legacy Framework

Helping You Plan for Retirement with Confidence.

1 Structure Your Wealth Build the Foundation

- Clarify your retirement lifestyle goals
- Inventory and organize all assets
- Define family legacy objectives
- Align investments with long-term priorities
- Create a coordinated wealth strategy

OUTCOME

Greater clarity around retirement and legacy planning goals.

2 Income Planning Strategies Use Assets Strategically in Retirement

- Tax-efficient withdrawal planning
- Social Security benefit analysis
- Retirement income design
- Roth conversion opportunities
- Investment allocation review

OUTCOME

Greater clarity around retirement income planning and wealth management decisions.

3 Protect Your Legacy Plan for What Matters Most

- Estate plan review
- Trust & beneficiary coordination
- Asset preservation strategies
- Long-term care considerations
- Tax and legal planning considerations

OUTCOME

A coordinated approach to legacy and estate planning goals.

4 Transfer with Purpose Support Generational Impact

- Family wealth transfer planning
- Legacy and values conversations
- Heir education and preparedness
- Charitable giving strategies
- Multi-generational wealth planning

OUTCOME

A plan focused on family legacy, charitable goals, and wealth transfer considerations.



RETIREMENT PLANNING

WEALTH MANAGEMENT

SUPPORT GENERATIONAL IMPACT

Kareen Blake

PHONE 781-990-5145 (Voice Only)
EMAIL kblake@baystatefinancial.com
WEB kblake-baystatefinancial.com

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