RPA RETIREMENT. PLAN. ADVICE. WEALTH MANAGEMENT

INDIVIDUALS SEEKING SUPPORT

FINANCIAL PLANNING FOR BIG LIFE CHANGES

A divorce, an accident, a forced career change—life has a way of disrupting our best-laid plans. Setbacks like these can wear on both emotions and finances, leaving you wondering how you will get through this tenuous time. We believe that a financial advisor who has your best interest at heart is a good start.

At RPA Wealth Management, we provide support for men and women struggling with big life changes. We offer empathy and expertise as we build a financial plan to help get you through this transition and beyond. And because we are fiduciaries, you can rely on us to put your interests first as we strive to get you back on your feet and moving toward financial well-being.

COMMON FINANCIAL CHALLENGES

- Will I have enough to live on?
- How do I meet these new expenses?
- What will happen to my retirement?
- How do I take care of my family?

HOW WE HELP

We are a support team for big life changes. Our goal in partnering with you is to help you rebuild, replacing anxiety about your financial future with confidence that you will be OK. We will start by assessing your financial situation and the impact of the life change you are undergoing. We will make sure to understand your concerns and goals, building a financial plan to address those needs and help ease you through this life transition.

We will work with you to:

- Understand your changing financial situation, needs, and objectives for the short and long term
- Build a financial plan that incorporates savings, investments, taxes, retirement, health care, and other needs
- Create an adaptable budget to address your immediate concerns while building toward future goals
- Proactively address your unique challenges such as medical costs or new career training
- Maintain regular contact so that we can help ensure your financial plan reflects your life changes

WHAT YOU RECEIVE

- Financial planning and investment management based on your situation and goals
- Fiduciary advice in your best interest and fee-only service without commissions or kickbacks
- The support of a team that includes CERTIFIED FINANCIAL PLANNER™ professionals
- An online portal that gives you big-picture and detailed views of your accounts 24/7
- Regular meetings (2–4 per year, or as often as you need) and unlimited email support

SERVICES

- Cash flow planning and budgeting
- Investment management
- Debt payoff strategies
- Tax optimization
- Retirement planning
- Insurance review and recommendations
- College loan strategies
- Estate and legacy planning

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