

Retirement is a goal that's shared by virtually everyone. And whether retirement is years away or right around the corner, advanced planning is critical to success. For those who are in the accumulation or savings phase of retirement planning, SVA helps them by refining their goals, helps them to determine the right amount of savings in order to reach those goals, and create and maintain portfolios with the right amount of risk to achieve those goals. For those who are at or near retirement, some really critical questions need to be answered. For example, can I afford to retire now? What do I need to do to recreate my paycheck once I'm no longer working? When should I take social security or IRA distributions in order to minimize taxes? Well given SVA's business structure as a wealth management firm, an accounting firm and a trust company, we're uniquely positioned to answer those questions for our clients.