Retirement and Financial Planning

Equitable Advisors

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CalSTRS/CalPERS Pension Planning

-educate staff on how to maximize their pension and the benefits within

403(b) Enrollment and Analysis

-we help staff with the enrollment and analysis of the 403(b)

Life Insurance & Long-Term Care

-we help staff pick a suitable insurance product given their needs

Previous Employer Rollovers

-in addition to the 403(b) we can help staff consolidate their previous retirement accounts

Student Loan Forgiveness Tools and Resources

-we educate staff on the Federal loan forgiveness options available and show them how to enroll (new COVID waiver allows for even more payments to qualify)

Retirement Distribution Strategies

-for those nearing or at retirement, we help the client maximize longevity while providing protection for their retirement savings

Schedule your virtual meeting today!