

Retirement Income Strategies Done Right

Moore Wealth Management

You might say that Shawna Moore was born to be a financial adviser. She was five years old when her father started an insurance agency, and just 18 and still in high school when she joined the family firm and earned her insurance license.

"I went 100% into it," she says. "I realized I had a knack for this. It's engrained in me." At 23 she started her own agency.

While a lot of financial advisers can help you grow your assets, Shawna specializes in helping to take those assets and create income plans for people within five to 10 years of retirement or already retired. She is a Retirement Income Certified Professional (RICP®) as well as a Financial Services Certified Professional (FSCP®) and Life Underwriter Training Council Fellow (LUTCF®).

"It really does take specialized training to know how to build an income plan versus the old school method of simply leaving all your money in the markets and withdrawing four percent every year. But that doesn't really work in today's world because of market volatility, inflation and taxes," she says. "Our goal is to create a comprehensive retirement strategy that utilizes investments, insurance, risk management, tax planning, and estate planning. Whether you need a comprehensive plan to pass on your legacy to your family or just a fresh look at an old retirement plan, roll over your 401(k), or a simple, no-frills rundown on how to minimize your taxes, you've come to the right place."

Sustain your retirement assets

Unlike many other firms that only cater to the super wealthy, Moore Wealth Management welcomes people such as teachers, firefighters, police officers, health care workers and business owners who have accumulated large retirement accounts that are not being actively managed. Many of them don't know what they should do with their 401(k) or employer plan once they retire. They have concerns about running out of money. They want a plan and a guaranteed income stream after retirement. Shawna helps them find solutions to calm their fears and create peace of mind knowing that their financial situation is completely under control.

"You've worked hard to get yourself to retirement," Shawna says. "It's our job to help you sustain and enjoy it."

While part of Shawna's strategy is old school, built on what she's learned during her career, she's also on the cutting edge of retirement income planning. She uses a five-step program called the New Generation Retirement system, a holistic approach to retirement planning



Shawna Moore

that incorporate three hallmarks that describe her company: fiduciary, transparency and technology. Through this planning process, you'll be confident that you've received careful consideration to asset allocation and risk, income planning, asset maximization, legacy planning and tax strategies.

"We take the time to know our clients," Shawna explains. "I see myself more as a financial coach rather than a financial adviser. We're not here to tell people what to do with their money but to help guide them and point them in the right direction. I work hard to make sure I get it right for each and every client. With people living in retirement thirty years or more, it's critical to get it right."



Moorewealthmanagement.net

833-4-MYWEALTH | Direct Line: 615-696-9178 | moore@moorewealthmanagement.net

145 Bear Crossing | Suite 148 | Mt Juliet, TN 37122

7025 W Bell Road | Suite C9 | Glendale, AZ 85308

480-800-7077

Join us each week for expert insights on retirement planning and wealth management.
You can listen to our podcast, Moore Wealth Retirement Talk, on Spotify, Apple Podcasts, or Amazon Music.

Investment advisory services offered through Moore Wealth Partners, LLC, a Registered Investment Advisor. Insurance products and services are offered through Moore Wealth Management, LLC, an affiliated company.