How We Work with You

Northstar FP is here to help answer any questions or concerns you have as you move toward retirement:

- How should I be preparing?
- Am I going to be okay?
- What are my life and financial options?
- Is my family protected?
- How do I manage my real estate?
- What should I change about my current financial strategies?
- How can I find peace with my future?

Let us help you take care of what matters most.

Our dedicated team of Fee-Only CFP® and CeFT® professionals take a holistic approach to Wealth Management and Financial Transitions Planning and work collaboratively to provide the highest level of personalized planning and service.

NORTHSTAR
FINANCIAL PLANNING

Retirement is one of the most important life transitions you'll experience, and getting it right takes planning.

As Certified Financial Transitionist® professionals, we will guide you through your retirement transition with clarity and confidence.

Our retirement expertise was further developed through the following organizations:

- Kinder Institute of Life Planning
- Finance Behavior Institute
- NAPFA
- Charles Schwab
- Dimensional Fund Advisors

Schedule Your Complimentary Consultation Today

603.458.2776
northstarfp.com

NORTHSTAR
FINANCIAL PLANNING

Retirement Planning Services

SUMMARY OF SERVICES

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northstarfp.com

RETIREMENT SERVICES

1. ORGANIZE

First, we listen to understand your personal circumstances and then create a path to make it manageable. We know retirement is a big step in life and are here to alleviate worries so you can maximize your comfortability and security in these upcoming years.

An action list is maintained, including resources and timelines, to ensure tasks are completed in a timely manner and to monitor progress.

2. PLAN

We are here to be your partner through your entry to and journey of retirement. Here at Northstar, we are here to support you in defining transitioning to this new stage of life by helping you to:

- Create a financial plan for your life in retirement in accordance with your vision
- Build a retirement paycheck strategy
- Develop investment and spending strategies aligned with your plan
- Manage risks of inflation, taxes, longevity, and health and long-term care
- Reduce taxes in coordination with your CPA.
- Help you you to implement financial planning recommendations
- Discuss your life and money in a comfortable judgment-free zone

3. TAKE ACTION

Once you have a clear view of where you stand financially and what steps you need to take, you can begin to embark on this new journey without fear and uncertainty.

WEALTH MANAGEMENT SERVICES

Fee-Only Fiduciary Advice

- Understand what money really means to you
- Prioritize your entire financial life
- Set goals, monitor and adjust as needed
- Create an action plan that moves you forward
- Implement your personalized investment plan
- Feel confident with guidance and reporting

At Northstar, we help you think about, then confidently act upon, your wealth and your life.

We help you rediscover life on your own.

THE JOURNEY FORWARD

Northstar's ongoing holistic Wealth Management service lets you focus on what is most important in your life. We help with the rest.

As your thinking partner, we help you attain the financial security you desire and stay on track to reach your financial life goals. We help:

- Create a new vision of the future.
- Stress-test your life and financial options.
- Decide how best to allocate your resources.
- Define your risk tolerance.
- Maintain an action list with timelines.
- Discuss your money and your life in a comfortable judgement-free zone.

We offer a complimentary "Get Acquainted" Meeting to discuss your situation.