

WEALTH WISE

NAVIGATE YOUR FINANCIAL FUTURE WITH CONFIDENCE

JULY 2024

WILL THE ELECTIONS IMPACT MY RETIREMENT?

SOCIAL SECURITY

Typically Social Security changes are small and enacted over time. However, with the current unsustainability of Social Security, changes are possible.

MEDICARE + HEALTHCARE

For most people, healthcare is the biggest expense in retirement. Adjustments to benefits, funding, and eligibility are likely.

TAX POLICIES

New tax laws and changes to existing ones will dictate how much of your retirement you get to keep.

RETIREMENT SAVINGS PLANS

Either directly or through broader economic policies, administration changes influence the stock market and the value of investments.

How can I ensure I am protected?

Talk to your local branch to schedule a complimentary review of your retirement plan.

FREE EDUCATIONAL SEMINARS

TAX REDUCTION IN RETIREMENT:

Tuesday June 30th. 6PM
StoneWater Country Club, Caledonia

or

Wednesday June 31st. 6PM
StoneWater Country Club, Caledonia

**COMPLIMENTARY
DINNER PROVIDED**



TO REGISTER VISIT:

[HTTPS://YOURSVP.COM/QENFUB](https://yoursvp.com/qenfub)

RETIREMENT ADVISOR WALK-IN HOURS

9AM - 12PM

MONDAY - GRANDVILLE

TUESDAY - ROCKFORD

WEDNESDAY - MIDDLEVILLE

THURSDAY - COMSTOCK PARK

FRIDAY - KENTWOOD



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COMPLIMENTARY REVIEWS AT YOUR LOCAL BRANCH
Social Security • Estate Planning • Taxes In Retirement