

Retirement Planning

When you're focused on meeting the day-to-day needs of your business, it's often difficult to put aside your hectic schedule and think about the future. Retirement may be years away, but planning now can help you look forward to a future free from worry. At Kennedy and Coe, we can help you prepare for a comfortable retirement while guiding you through the variety of employee retirement plans available to ensure your staff is also prepared.

We'll take a hard look at your specific goals, then help you structure a package that gets retirement funds to the people for whom they are intended. If yours is a small company, this may mean the owners. The larger your company, the more key employees you may want to include.

Retirement planning should fit your company's business plan, your employees' needs and your personal needs as an owner. We'll see that your retirement plan works in conjunction with the long-term goals you may have to retire, merge, or sell or transfer ownership of your company to a new generation. We'll take a big-picture look at these components and offer more options, more expertise and more professionalism than can be found with most brokers and investment companies. When you call Kennedy and Coe, you'll speak with a seasoned professional who can give you answers ... and opportunities.

- From group 401(k)s to individual retirement accounts and more, Kennedy and Coe has the expertise and retirement options to design a plan that's right for your business.
- Kennedy and Coe delivers timely, accurate information that provides an ongoing awareness of tax law changes that could affect your business, as well as strategies for minimizing your tax burden.

Our Wealth Creation Management Division can help you create a dynamic and efficient retirement plan so your business can continue to succeed generation after generation.

Call 800-303-3241 for more information.