

Knowing that you will have enough investment income to retire comfortably can bring enormous peace of mind. And Copeland Wealth Management can help make sure you're on track.

Our planning and investment management allows us to answer the questions that are foremost in retirement investors' minds, including:

- Am I on track for retirement?
- How much investment income will I need to retire comfortably?
- How much money must I save in order to retire?
- How might inflation impact my retirement?
- Will my spouse have enough income if I die first?

To provide these answers, we need information. We ask that you bring answers to the following questions when we meet:

- What is your total household income, and will the income continue when you retire?

- How many years from now do you plan to retire?
- How much have you saved for retirement?
- Are you currently saving money toward retirement? If so, how much per month?
- Will you likely take any debt into retirement? If so, how much and what are the terms?
- When do you expect to receive your Social Security benefit, and what will the monthly income be?
- Do you have a pension? How much do you expect to receive from it and when? Is there a spousal benefit?
- Are you comfortable investing in both stocks and bonds?
- Do you have health insurance?
- What is your monthly cost of living?