

Welcome to Route2®Retire: Your Path to Financial Freedom

Discover a Clear Path to Your Financial Goals with WSG's Route2®Retire

Wealth Strategy Group (WSG) understands that planning for your financial future can be complex and overwhelming. That's why we've developed Route2®Retire (R2R), a comprehensive suite of tools and resources designed to simplify the process and put you on the path to financial freedom.

What is Route2®Retire?

R2R is a comprehensive financial planning program tailored to help you gather, organize, and understand your financial data. It serves as the foundation for creating a personalized financial plan that aligns with your goals, dreams, and aspirations.

Why Choose Route2®Retire?

- **Holistic Approach:** Our R2R process takes a 360-degree view of your financial situation, addressing each aspect of your financial life that should be considered and integrated into your plan.
 - **Tailored Solutions:** We recognize that each client's financial journey is unique. R2R is customizable to meet your specific needs and goals.
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Key Components of Route2®Retire

1. **Route2®Retire Workbook:**
 - **Guided Data Collection:** The R2R Workbook is your starting point, designed to help you gather and organize your financial information with ease. It covers everything from income and expenses to assets and liabilities.
 - **Simple and Intuitive:** Our workbook is user-friendly, making it easy for you to input your data accurately and efficiently.
2. **Route2®Retire Roadmap (Powered by Wealth Vision):**
 - **Advanced Planning Software:** The R2R Roadmap utilizes Wealth Vision's robust financial planning software to create a dynamic and interactive plan for your future.
 - **Real-Time Updates:** Your financial plan is always up to date, reflecting changes in your financial situation and market conditions.

- o **Goal Tracking:** Set and track your financial goals, whether it's saving for retirement, buying a home, or funding your child's education.

3. Professional Guidance:

- o **Dedicated Advisors:** Our team of experienced advisors will work with you every step of the way, providing personalized advice and support.
- o **Regular Reviews:** We conduct regular reviews of your financial plan to address that you are on track and make adjustments as needed.

Additional Resources:

- **Educational Seminars and Webinars:** Stay informed with our ongoing series of educational events covering a wide range of financial topics.
- **Bi-Monthly Podcasts:** Tune in to our podcasts for professional insights and practical tips on managing your finances.
- **Digital Resources:** Access a wealth of information through our website, including articles, videos, and tools designed to enhance your financial knowledge.

Get Started Today!

Take the first step toward pursuing your financial future with Route2®Retire. Contact us to schedule a consultation and receive your R2R Workbook. Together, we'll build a roadmap to work toward your financial goals.

Contact Us Today!

Visit our website: wsginvest.com

Call us:

Marquette, MI Office: 906-228-3696

Tomahawk, WI Office: 715-453-0722

Start your journey to financial freedom with WSG and Route2®Retire. Your future awaits!