



50-60 YRS

Transitioning to Retirement

In our 50s and 60s, we're just a few years from retirement. This is when we can start looking forward to doing the things we didn't have time for when we were balancing the responsibilities of a career and a family. Whether you had always planned on travelling the world, buying a beach house or a lake home, or spending time diving into your hobbies – or even a new business venture – this is a time of life that's filled with promise and opportunity.

With retirement around the corner, now it's an ideal point for making your investment portfolio retirement-ready. Do you have enough income-generating assets? Are you invested in low or moderate risk investments that are suitable for this stage? Are you maximising your superannuation contributions to get the most out of your retirement savings? Will you be able to retire with minimal debt?

Wealth Inspired can guide you during this stage, ensuring your transition to a retirement you'll be able to enjoy.

We can help you with:

- Refining your retirement plan
- Advising on and setting up wills and trusts
- Helping your children financially

- Protecting your assets
- Eliminating debt

We'll listen to your goals so we can develop the right strategies to maximise your wealth in retirement. We recommend talking to a financial planner at least five years before your expected retirement date to ensure you have a plan in place that's working toward your goals.

To learn more about how we can help you prepare for a fulfilling retirement.

For more information please contact us on

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