

Lifestyle Services

It means getting the most out of life!

You've got a great life - and you've worked hard to make it and keep it that way. Putting in the hours - saving - investing - planning: making the tough choices, the right choices... the best choices. Yet, some of your most important choices still lie ahead. Where will you live? How will you live? Will you be able to have the lifestyle you want? Preserve your freedom? Provide for your family? That's what our **Lifestyle Services** is all about: helping you make the right choices, so you can live your life the way you like it.

As we mature, the relationship between financial needs and lifestyle choices can become increasingly complex. As your **Lifestyle Services** professional, we can help you better see and understand the big picture, so you can make your best decisions in your retirement years.

For your changing needs, we offer a comprehensive, tailored approach to include:

TRADITIONAL SERVICES

Financial planning
Retirement planning
Estate and legacy planning
Tax preparation
Investment advisory services*

PERSONAL SERVICES

Record keeping
Bill paying
Budgeting
Managing expenses
Bank statement reconciliation
Monitoring income, investments and expenses
Compiling important records
Referrals for outside services
Partnerships with other professionals
Communication with loved ones

CONSULTING SERVICES

Retirement issues
Estate issues
Insurance issues
Legal issues
Daily living issues

Q. What is the benefit of Lifestyle Services to me?

A. **Lifestyle Services** is a unique, customized package of services designed to help you manage the business of life so you can maintain your lifestyle and financial independence. It means getting the most out of your life.

Q. Will I be expected to pay for services I don't need?

A. Absolutely not. One of the strengths of **Lifestyle Services** is flexibility - we can tailor our services specifically to meet your individual needs.

Q. Now that she's on her own, Mom has had a difficult time managing her accounts and assessing her long-term needs. I want to help her... can Lifestyle Services help us both?

A. Definitely! **Lifestyle Services** can be of special benefit for time-pressed families who want to help a loved one maximize and maintain their independence. **Lifestyle Services** is especially valuable in helping families come together to make sound, caring decisions.

Find out how our **Lifestyle Services** can make a difference for you. Call us today for more details.

* Advisory Services Offered Through Commonwealth Financial Network, a Registered Investment Adviser.

Kerkering, Barberio & Co.

Certified Public Accountants

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