

See the future so you can plan for it.



Health and care costs are the biggest unknowns in financial planning. Most advisors base their estimates on the average person. **But you're not average.**

That's why we customize our projections with HALO – the Health Analysis and Longevity Optimizer.

Projections as unique as you are

HALO brings science and customization to our health and care cost projections. Take the assessment, and we'll get the personalized projections we need to make sure you enjoy a healthy retirement.

Prepare by planning ahead

HALO teaches us a lot about your future, including how to plan for healthy and active retirement years, out-of-pocket health care costs, and home or assisted care costs.

1 Take the HALO Assessment

2 Review your custom longevity projection

3 Discuss the results and make a plan together!

