VIDEO BOOKLET SCRIPT

I'm Megan Avery and I'm a Chartered Financial Consultant.  I work with clients helping them transition into retirement or those deep in it, by creating and implementing personalized income, retirement and wealth transfer strategies.

My clients range from what I like to call the investment phobic to seasoned do it your-selfers.

My focus is on helping to ensure their efforts are effective, efficient, and sustainable.  Many retirees take a “one financial product type fits all” approach to plan development which can be improvised.  They randomly invest without a true understanding of what their end goal really is and how inflation, taxation, sequence of returns and withdraws can effect it.

I help my clients apply a well-choreographed approach to developing a plan for their retirement income utilizing investment and asset protection strategies, like fixed annuities, one that leverages the financial options available. With a clear path, we capitalize on their unique financial needs.  Together, we define the strategy, weigh the risk, and monitor accountability, all while boosting financial confidence and understanding.   Success for me is defined not only by the ability of my clients to reach their financial goals, but also by their enjoyment in getting there.

As always, the best compliment you can pay is a referral.

Come in for your retirement checkup today.

**Verbiage below will have to appear on screen**

* *Independent of Questar Capital Corporation Member FINRA/SIPC and Questar Asset Management.*