# Wealth Management

## Mass Mutual and Member Wealth Management are part of our team.

It takes teamwork to secure your future. When you need someone to help you make smart investment choices or to guide you through retirement planning, we're here for you. We have partnered with Mass Mutual and Member Wealth Management to work with you to develop a plan to make the most of your money. Their advisors can help ensure that your roadmap for the future is charted for success.

## Who is it for?

Everyone can benefit from wealth management. It is a lifelong process, whether you are just starting out in the work force, getting ready for retirement or managing your retirement income, everyone can reap the benefits from smart wealth management. Using a planning process can keep you ahead of the financial game as well as keeping you focused on your goals. When it comes to planning for your future and dealing with everything from college planning, retirement planning or even estate strategies, it can help to have someone who's experienced and knowledgeable to assist you along the way.

### Member Wealth Management services include:

- Retirement and income strategies
- Investment analysis and portfolio allocation
- Wealth transfer and estate planning strategies

### Investment services include:

- Mutual funds
- Fixed and Variable annuities
- Traditional and Roth IRA's
- 529 plans (college savings plans)
- Individual stocks and bonds
- 401(k) and other retirement plans

### Insurance services include:

- Life Insurance
- Disability Income Insurance
- Long Term Care Insurance


For more information, please call our Member Wealth Management Coordinator, Jonathan Jones, at (757) 493-4345 or e-mail him at jjones@financialguide.com to schedule an appointment.