



Self-funded retirees

As a self-funded retiree you've spent your whole life working towards this point. You've worked hard, and you're proud of what you've achieved. Now it's time to enjoy the fruits of your working life.

But always in your mind is the thought that once you've successfully transitioned out of your working life you need the right structures in place to ensure the financial well-being of your family, whether it's your partner, your children, and even your grand children. You might also worry that transitioning into retirement means letting go of a successful career, a key part of what you consider your identity.

Retirement doesn't have to be a mystery. Yes, managing your retirement equity is crucial if you want to maintain the cash flow and lifestyle you've always enjoyed, to allow yourself to take full advantage of your retirement—but we're here to help you with that. You'll be able to see that there's a life for you on the other side of working, one that we can help you maintain, and you can get on with living the retirement you've dreamed of.

What you care about

- Being able to enjoy your retirement to the fullest
- Your family, and seeing them supported in the future
- Continuing to be able to give back to the community through social work and charitable giving

What's worrying you

- Uncertainty around your income post-retirement, and the financial security for you and your family
- Losing the sense of self that you've built around your career—what will retirement look like?
- How you'll relate to the community when you no longer work, and how you can continue to give back
- How to manage your personal finances consistently, and successfully juggle investments
- The preservation of both your career's legacy and your hard-earned capital
- Your family's financial future when you're no longer in the picture

How we help you

Stephan Independent Advisory help you take the uncertainty out of your retirement management, by working with you to implement strategies for your accumulated wealth, partnering with a team of professionals to make sure all elements of your financial health are taken into account, and putting the necessary structures in place so you and your family can enjoy your retirement to its fullest.

We'll be with you every step of the way, meeting with you regularly to continually review your progress and make sure your Wealth Management Plan is keeping pace with the changes in your lifestyle.

Together with you, we'll make sure your Plan continues to meet the evolving needs of your retirement for the long term.



Stephan
Independent
Advisory

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