Areas of Focus

Investments
- Asset Allocation
- Withdrawal Strategies

Tax Optimization
- Roth Conversions
- Tax-Loss Harvesting

Retirement
- Sustainable Income
- Social Security/Medicare

Insurance
- Right-Size Coverage
- Income Replacement

Estate Planning
- Wealth Protection
- Tax Efficiency

Financial Planning

Comprehensive financial planning provides a structured roadmap to manage all aspects of your family's finances, including budgeting, saving, investing, insurance, taxes, retirement, and estate planning.

Whether it's saving for a major life milestone, optimizing your tax strategy, or planning for retirement, we consider all scenarios to ensure your plan is adaptable. By evaluating both your current financial situation and future aspirations, we help ensure long-term financial security and success.

Contact Us

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Merrimack Wealth Management

Our Approach

1. *Consultation*
2. *Data Gathering*
3. *Presentation*
4. *Implementation*
5. *Annual Review*