

THE SULLIVAN READY RETIREMENT REPORT

READY (adjective) “fully prepared.” At Sullivan Retirement Resources, our main focus is to secure the retirement you and your family deserve. And we’re READY to help make it happen.



RETIRE ON **YOUR TERMS**

Our goal is to empower you and allow you to take control of the retirement process.



ENSURE THAT YOU NEVER RUN OUT OF **MONEY**

We strive to help you to NEVER outlive your income. Financial independence and dignity are essential for your “golden years.”



ANALYZE YOUR HOLDINGS AND IDENTIFY **LONG-TERM SOLUTIONS**

Are you on track? Do you have the right investment mix at this stage of your life? Learn what options and alternative strategies are available to help you achieve your goals.



DESIGN TAX-ADVANTAGED **STRATEGIES**

We aim to help you eliminate any unnecessary taxes, keep more of your hard-earned income and enjoy your retirement to the fullest.



YOU RECEIVE A CUSTOMIZED PLAN BASED ON **YOUR GOALS**

There is no such thing as a “cookie-cutter” plan. You and your goals are unique. Your plan will be personalized and reflect your family’s values and dreams.

You have worked hard, saved and sacrificed for decades. You deserve the peace of mind that comes with knowing you can achieve a safe and secure retirement.

Main Location

850 Franklin St.
Suite 12A
Wrentham, MA 02093

Office of Convenience

186 Princeton-Hightstown Road
Building 4A, 2nd Floor
Princeton Junction, NJ 08550

P: 774.847.9949

F: 774.847.9952

E: dan@sullivanretirement.com

WWW.SULLIVANRETIREMENT.COM

Investment advice provided by Sullivan Retirement Resources, LLC. Sullivan Retirement Resources, LLC is a Registered Investment Adviser.