

## We're on a Mission to Transform the Way Families Retire

Financial planning is often narrowly focused on the growth of your investments. As you approach retirement however, you'll most likely need comprehensive advice that includes Social Security, replacing your income, not running out of money, reducing retirement taxes, protecting your hard-earned money from market downturns, and growing your investments.

At Leading Edge Wealth Management, we address the key financial pieces of a retirement plan, while also helping clients focus on what matters most: family, relationships, giving back, and fulfillment.



**Alka Oberoi,**  
**CRPC, AIF®, NSSA®, IRMAA**

Fiduciary Financial  
Advisor  
and Retirement Income  
Planning Specialist

**All the Fiduciary Planning, Resources,  
Assistance, and One-On-One Meetings You  
Need to Retire with Confidence and Clarity**



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Alka G. Oberoi is a Leading Edge Wealth Management, LLC Financial Advisor. Fidelity Investments is a Custodian of securities, Investments and Advisory services are offered via Leading Edge Wealth Management, LLC.

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We have an obligation to act in the best interests of our clients and to make full disclosure of any conflicts of interests, if any exist. Please refer to our firm brochure, the ADV 2A, for additional information.

## We Help You Transition into Retirement



### Experts in:



Social Security claiming strategies



Replacing your working income



Positioning investments before and after retirement



Avoiding retirement tax traps



Safe money planning and market volatility



## Are you ready to retire?

Consider these questions...

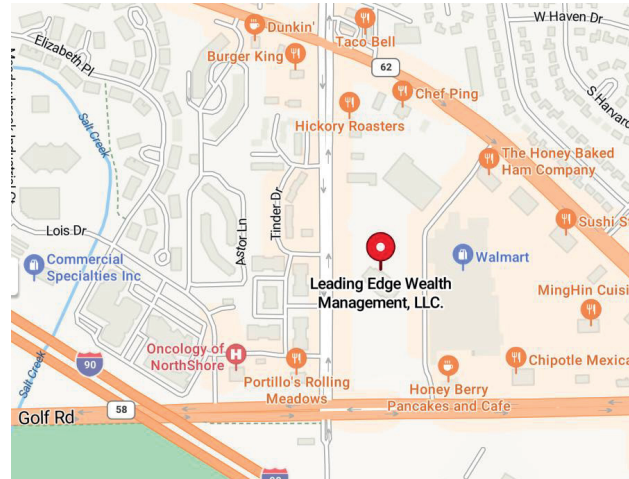
- How much will your Social Security benefit be?
- When should you take Social Security?
- How can you maximize your benefit?
- Are you confident moving forward?

## Our Three Lanes of Focus

- Investment Management
- Retirement & Financial Planning
- Tax Management & Retirement Distribution Planning

## Schedule a complimentary consultation with Leading Edge Wealth Management.

Let's discuss your goals, address your concerns, and explore how our Retirement Transition Blueprint can help you achieve the secure and fulfilling retirement you deserve.



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## You Need a Comprehensive "Retirement Transition Blueprint"

Our retirement planning services include creating a customized Retirement Transition Blueprint.

This addresses, integrates, and simplifies the seven critical components every successful retirement plan should include.

We often see financial professionals address one or two of these components.

But it takes all of these components working together in alignment to create a truly successful and thriving retirement

