



About Us

Encore Retirement Planning specializes in bespoke retirement planning and investment management services for those nearing retirement with substantial wealth. Our unique flat fee structure ensures cost-effective wealth management, leveraging economies of scale. Teaming up with Encore Tax, we seamlessly integrate integrated tax planning and preparation, simplifying access to expert tax-aware advice. This collaboration provides clients with a streamlined and comprehensive approach to financial well-being, combining retirement planning, investment management, and tax optimization. Trust Encore Retirement Planning and Encore Tax as your dedicated allies on the journey to a secure and prosperous retirement.

Service Quick Facts:

- I work virtually with individuals and couples over 50 around the US.
- Flat fees give the benefit of returns back to the client.
- You can obtain financial advice and tax advice under the same roof.
- We offer comprehensive financial guidance for retirement planning and decision-making
- We provide services for a straightforward flat fee, avoiding hidden fees or unexpected charges
- Seamlessly integrate tax planning and preparation into retirement planning services.
- Convenience of tax expertise under the same roof.

Social

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