



Video Title: Enough to Retire

Target Audience: Prospects, Clients, COIs
Estimated Total Runtime: <1:00
Strategy: Post on website, social media, send in email

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[Eric]

Do You Ever Ask Yourself, "Will I Be Okay?"

If you're nearing retirement, chances are you're wondering if you have enough – or if there's something you're missing.

You're not alone. These are the most common questions I hear.

The uncertainty about whether you can support your family, manage taxes, weather inflation, or even navigate Social Security can feel overwhelming.

That's where we come in.

We use strategies and tools to analyze your financial picture. We'll review your cash flow, risk levels, and investments, to see if they align with your retirement goals. If something needs adjusting, we'll plot a course of action.

After working with us, people feel much more confident, knowing exactly where they stand.

If you're concerned whether you have enough to retire – reach out to today via phone or email, for a free risk analysis and planning.

Email Subject Line: VIDEO: Are You Asking, "Do I Have Enough to Retire?"

Email Copy:

If you're nearing retirement, chances are you've asked yourself, "Will I be okay?" or "Do I have enough?" These are some of the most common questions I hear from pre-retirees—and it's completely understandable.

This short video is the first step to understanding what we can do to help you confidently answer these questions:

[Thumbnail hyperlinked to video]

If you're concerned about whether you have enough to retire, let's talk. Reach out for a free risk analysis and retirement planning session.

[Add 'Schedule a meeting with me' link]

Social Tease:

Are You Asking, "Do I Have Enough to Retire?" 🤔

If you're nearing retirement, it's normal to wonder if your finances will be enough to support your family, manage taxes, and weather inflation. You're not alone in asking those questions.

We help you take the uncertainty out of retirement planning.

Reach out today for a free risk analysis and planning consultation. Link in comments.

#RetirementPlanning #FinancialSecurity #FutureGoals #RiskAnalysis #RetirementReady
#PlanWithConfidence

[Direct Upload mp4 file]

[Add 'Schedule a meeting with me' link in comments]

Website Blog/YouTube Title: Do You Have Enough to Retire?

Website Blog/YouTube Copy:

As you approach retirement, you may be asking yourself, "Do I have enough?" or "Am I missing something?" This is a common question among pre-retirees—and it's not surprising. The uncertainty surrounding family support, managing taxes, dealing with inflation, and navigating Social Security can feel overwhelming.

That's where we come in. At Presidio Wealth Management, we help answer these questions by thoroughly analyzing your financial picture. We assess your cash flow, investment strategy, and risk levels, ensuring everything aligns with your retirement goals. If adjustments are needed, we create a tailored plan to help you stay on track.

After working with us, many clients feel a greater sense of confidence, knowing exactly where they stand and what steps to take next.

If you're worried about whether you have enough to retire, reach out for a free risk analysis and planning consultation.

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