RETIRE WISE

OUR MISSION & CORE VALUES

Retirement planning guided by faith, built on integrity, and centered entirely on you.

OUR PROMISE TO YOU

We help you retire not just comfortably, but wisely — with a plan you understand, a team that listens, and the confidence that comes from knowing someone is always in your corner.

RETIRE WISE, LLC

Comprehensive Investment & Retirement Planning | Lawrenceville, Georgia

404.692.1233 | retirewisepro.com

WHY WE DO THIS WORK

Our Mission

At Retire Wise, our mission is to empower individuals and families to plan confidently for the future by providing clear, personalized retirement strategies. Guided by Christian values, we are committed to serving others with integrity, compassion, and stewardship. Through transparency, education, and sound financial guidance, we strive to build lifelong relationships so our clients can retire not just comfortably, but wisely.

> *"Retire not just comfortably, but wisely."*

WHAT GUIDES US

Seven Core Values

These are not words on a wall. They are the standards we hold ourselves to in every conversation, every recommendation, and every plan we build.

1. Faith-Driven Purpose
2. Integrity
3. Wise Stewardship Rooted in Experience
4. Guidance with Heart
5. Education with Clarity Over Complexity
6. Excellence and Trust in All We Do
7. Lifelong Relationships: People First, Always

THE STANDARDS BEHIND EVERY PLAN

Our Core Values

1

Faith-Driven Purpose

We are guided by Christian principles in every business decision we make, serving others with humility, grace, and purpose.

2

Integrity

We uphold the highest standard of care, always acting in the best interests of our clients — honestly, transparently, and without compromise. As an Investment Adviser Representative, we have a fiduciary responsibility to act in our clients' best interest when offering or recommending investment advisory products and services.

3

Wise Stewardship Rooted in Experience

We view financial planning as a form of stewardship, helping clients manage resources with care, intention, and long-term vision. With decades of experience comes more than knowledge — it brings perspective. We help bring calm confidence to your financial questions.

4

Guidance with Heart

We're not just number crunchers; we listen before taking action. We offer financial wisdom paired with genuine understanding, so you feel confident and cared for at every step. We aim to remove fear from financial planning by delivering clear, customized, actionable steps toward a more confident financial future.

5

Education with Clarity Over Complexity

We equip clients with the knowledge they need to make confident, informed decisions — free from fear or confusion. Money doesn't have to be intimidating. We break complex ideas into simple, honest advice you can trust and understand.

6

Excellence and Trust in All We Do

We strive for the highest standards in our work, our communication, and our client experience. Transparency, accountability, and follow-through are the cornerstones of our relationships. We don't just talk about trust — we prove it in every interaction.

7

Lifelong Relationships: People First, Always

We believe that financial planning starts with real conversations and real relationships. Every client is treated like family — with respect, compassion, and care for their journey. We don't just plan for retirement; we plan to be there with you through retirement.

OUR COMMITMENT

Every value on these pages points to the same commitment: your goals, your family, and your financial future come first — in every recommendation we make.

THE NEXT STEP

Let's build your plan — wisely.

Every plan begins with a conversation. Whether you are years from retirement or already there, we would be honored to listen first, explain clearly, and help you move forward with confidence.

SCHEDULE A CONVERSATION

CONNECT WITH US

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RETIRE WISE

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