



# Retirement Strategies, Inc.

PATH TO CONFIDENCE

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## OUR MISSION

We help clients make smart choices about their money so they can live their values and achieve their vision.

## OUR CORE VALUES

**Caring** - Making a difference by giving our best to our clients, strategic partners and each other every day.

**Integrity** - Earning trust by always placing our clients' interests first and doing what is right.

**Excellence** - Committing ourselves to lifelong learning and continuous improvement of our skills, creativity, and wisdom to excel in all we do.

**Team** - Combining our unique strengths and expertise to achieve greater results for our clients and team.

**Balance** - Striving to live fully in each area of life – family, faith, health, work and community – to enrich our lives and those we serve.

## OUR VISION

Recognized as a leading client-centered wealth management firm that makes a difference in our clients' lives and the communities we serve now and for the generations to come.