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Sharing reader photos

If you would like to discontinue receiving Sunday Stories, please call 423-392-1390.

### Dining Deals of the Week

#### Lynn Garden Restaurant

Deal of the Week

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## SUNDAY STORIES

A SPECIAL EDITION OF THE KINGSPORT TIMES-NEWS • SUNDAY, JANUARY 1, 2017

#### **B&H Wealth Strategies**

# Start of a new year is perfect time to evaluate your financial future

By Katina Rose

As the New Year begins, it's a good time to evaluate your financial future.

Jeff Bingham, owner of B&H Wealth Strategies, said a common question he frequently hears is "Do I have enough money to retire?"

B&H Wealth Strategies celebrated 50 years in business last year and has answered that same question for many of their clients during that time.

The firm uses an analytical tool, also referred to as a "Retirement GPS" to help people determine their future financial needs.

"It enables us to place a client's goals and values, along with a full range of financial resources, to create situations that will determine if they have enough money to support themselves and their families during their lifetime. After



The Retirement Specialist

we carefully listen to them, we'll present it back to them to make sure we understand their goals. In the initial meeting, we also want them to feel comfortable asking us as many questions as we ask them. We are interested in listening to them so we can set up a plan with the best investment strategy for the client's financial needs. We want this to be an educational process, so from the very

beginning, and along the entire journey, we provide weekly information to keep our clients informed about current situations in the economy and how it may impact them. We filter the economic business 'noise' for our clients to provide them with the knowledge they need during turbulent times," said Bingham.

"How To Live and Retire Well" roundtable events are held throughout the year to provide potential clients with information, answer questions about retirement planning and explain how B&H Wealth Strategies can assist with financial planning. They also provide resources on how to transition from a full-time working identity to a successful retirement.

During the roundtable events, participants are invited to actively participate as Bingham discusses the fundamentals of financial planning and transitioning into retirement.

"We also want to help our clients prepare for future health care costs."



B&H Wealth Strategies, located at 1402 East Center Street in Kingsport, celebrated 50 years in business in 2016 and enjoys helping clients evaluate and plan for their future financial needs.

At B&H Wealth Strategies, we understand that sometimes people have an unplanned retirement and may have to eventually get back into the workforce. We assist them on how to bridge the gap until they find work again, and for the long-term financial future. We provide guidance when assets have to be used for a length of time and on how that will impact future retirement plans," said Bingham. "We can let you know if your past actions are going to work for your financial future."

Bingham explains that they work with multi-generational families and develop a personal relationship with the client's children and grandchildren. The firm also believes in educating clients about their overall well-being. Clients receive regular communication about their financial portfolio performance, along with advice on how to stay connected in the community, and how to maintain a healthy lifestyle.

"We provide a 'Living and Aging Well' booklet to introduce prospective clients to our financial planning services. It can be downloaded from the website or, upon request, we'll mail one out."

Bingham and his staff want to pass along what they have learned from the past 50 years of B&H Wealth Strategies successfully helping clients live a happy and healthy retirement.

B&H Wealth Strategies is conveniently located at 1402 East Center Street in Kingsport and parking is located behind the house. To make an appointment or for further information, call 423-247-1152, email jeff@bhretire.com or view the website at www.bhretire.com. Follow them on Facebook at B&H Wealth Strategies, on Twitter at BH Wealth Strategies and connect with them on LinkedIn.

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