

Retirement Planning with Matthew Terzian, Vice President and Portfolio Manager with Resources Management Corporation

6:00 pm Thursday March 28, 2019

Each and every person on this earth is unique, and this same prevailing truth exists in retirement. When looking at this stage of life, one can stay focused entirely on the dollars and cents side of the equation. While this is important, there are many other facets involved in enjoying a long and prosperous retirement, and every situation has its own distinct circumstances.

In our conversation, we will review a landscape where people are living longer as medical costs rise and pensions become a thing of the past. While more and more people are at risk of not having enough money to maintain their standards in retirement, there are strategies that can be used to overcome these speedbumps and achieve financial fitness.

We will also look at ways to optimize all of your assets and not just your investments. These assets include your time, talents, health, home, collectibles and art. Lastly, we will look at the more traditional side of investing, including setting financial goals and objectives to reach an appropriate asset allocation to best balance risks with an individual's income needs in retirement.

He is Vice President and Portfolio manager with Resources Management Corporation based in Litchfield. Prior to joining RMC, he was a Vice President at Bradley, Foster & Sargent, where he was responsible for acquisition of new business and the primary relationship manager for those clients.

Previously, Terzian was a Senior Portfolio Manager & Vice President at BNY Mellon in Los Angeles. While at BNY Mellon, he was responsible for relationships with high net worth individuals, families and trusts. Mr. Terzian is Chartered Financial Analyst and Certified Financial Planner.

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