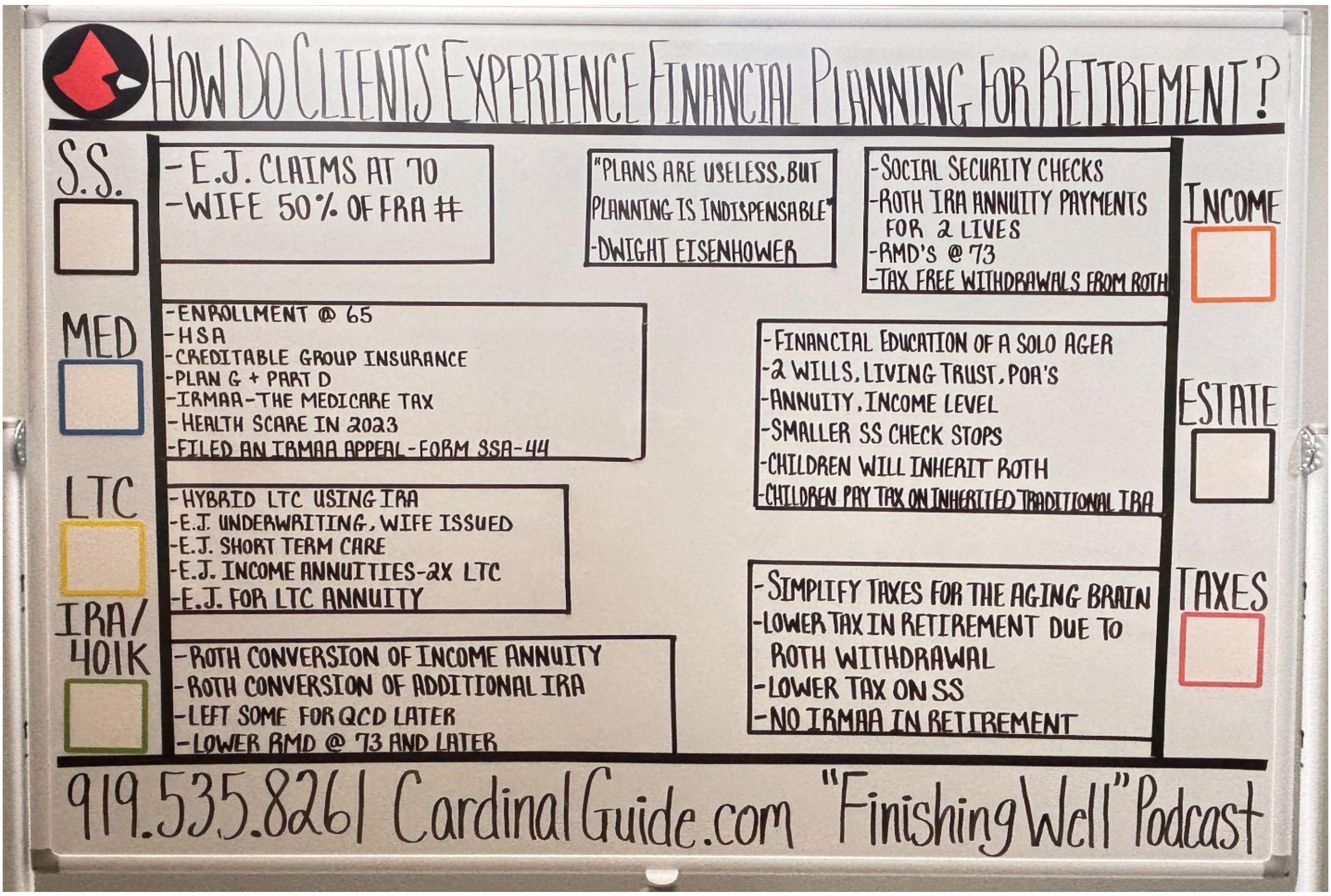
CARDINAL ADVISORS

# How Do Clients Experience Financial Planning For Retirement?

This real case study on retirement planning covers Social Security timing, Medicare/IRMAA strategy, long-term care coverage, and Roth conversions, all working together to lower taxes and simplify retirement.



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