TOP RANK
ADVISORS

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TopRankAdvisors.com

OUR FIRM

We are a full-service financial planning firm specializing in wealth management, federal benefits and taxes. Our passion for educating people on finance separates our firm from the rest of the financial world. With over 50 years of combined financial expertise, we bring clients the full financial planning and tax preparation resources they need all under one roof.

Ryan Polimeni, Owner and CEO of Top Rank Advisors, is backed by an experienced team of professionals, including Bryant Stone, Chief Investment Officer and Investment Advisor Representative, Candace Mastropolo, Director of Client Management, Michelle Mattison, CPA, and a team of Investment Advisor Representatives.

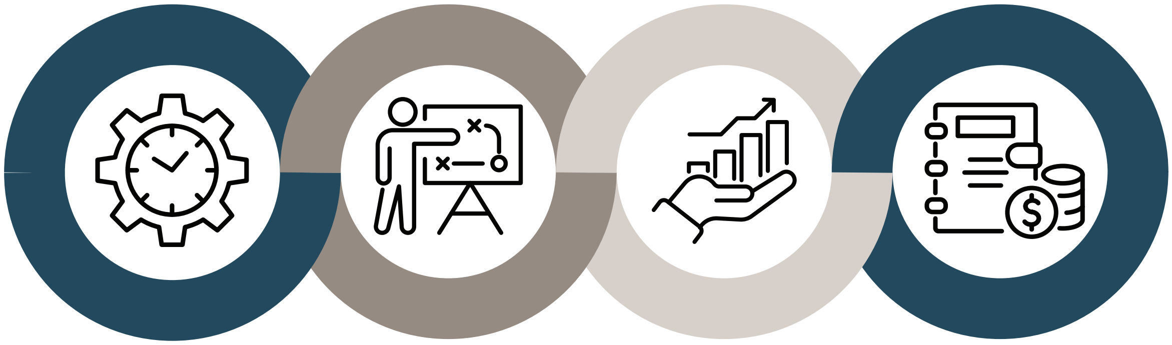
Our Services

- Income Planning
- Estate Planning
- Debt Reduction
- Pension Projections
- Medicare
- Social Security Planning
- College Planning
- Life Insurance
- Annuities
- Tax Planning
- TSP Rollovers
- Wealth Management

Our Partners & Affiliations

my FED UNIVERSITY

TOP RANK RETIREMENT ROADMAP



Phase 01
Discovery Visit

We start with a set of questions that will help us gain a deep understanding of who you are and what is important to you, including planning for income to cover bills, setting a retirement date and goals, accumulation and maximization, personalized portfolio building, tax planning and insurance planning.

Phase 02
Strategy Planning Visit

After understanding your short-term goals, we help design strategies to fit your lifestyle and long-term goals with RMD planning, lifetime income strategies, tax mitigation and Social Security planning.

Phase 03
Implementation Visit

We begin executing your goals for the future, including generational asset passing planning.

Phase 04
Client Experience Visit

Through constant monitoring, we can integrate changes to your plan and ensure that your plan continues to meet your needs.

Our Technology

We offer a FREE financial planning tool to link and manage ALL investments in one user-friendly portal.

Features Include:

- Account Organizer
- Budget Management
- Investment Tracking
- Tax Planning
- Social Security Maximization
- Secure Vault
- Updated Reports

Useful For:

- Foundational Planning
- Goal Setting
- Interactive Scenario Planning
- Interactive Retirement Income Planning
- Comprehensive Tax Calculations
- And Much More

Contact

Phone: 919.300.5870 | **Fax:** 919.916.5129 | toprankadvisorsllc
toprankadvisors.com | Candace@toprankadvisors.com