

Serenity Wealth Management Champions Fiduciary Standard with Emphasis on Tax Risk Mitigation

LONG BEACH, CA, UNITED STATES, June 30, 2025 /EINPresswire.com/ -- [Serenity Wealth Management](#) underscores its commitment to fiduciary standards by addressing key components of comprehensive retirement planning, with a particular focus on the evolving tax risk landscape. As fiduciaries, Serenity Wealth Management is steadfast in its mission to act in the best interests of its clients, putting their financial well-being ahead of everything else.



Serenity Wealth Management Logo

A fiduciary's purpose is clear: to act on behalf of clients with the utmost trust and good faith. This responsibility has seen significant evolution. Originally concentrated on mitigating market risk, the role of fiduciaries today extends to addressing income and, now, increasingly, tax risk.

With the financial landscape changing, Indexed Universal Life (IUL) insurance is at the forefront of Serenity Wealth Management's strategies to mitigate tax risk. This product, known for its power of indexing and tax-free distributions, is revolutionizing retirement planning by offering diverse benefits, including legacy creation and living benefits tailored to offset healthcare costs in aging.

Both managed accounts and IUL policies can meet fiduciary standards when realistic assumptions are considered. Serenity Wealth Management leverages cutting-edge strategies to ensure its clients receive tailored recommendations that address market, income, and [tax risks](#).

Furthermore, Serenity Wealth Management is committed to demystifying the cost of life insurance products like IUL. Through comprehensive analyses, advisors demonstrate competitive pricing factors and how IUL's structured costs can offer value comparable to traditional instruments such as 401(k)s and managed accounts over the long term.

Serenity Wealth Management believes that fostering open dialogues about risks and

opportunities in retirement planning is crucial. Savers deserve transparent discussions about the varied risks they may encounter and the innovative solutions available to address these risks.

****[About Serenity Wealth Management](#)****

Serenity Wealth Management is an independent fiduciary financial advisor firm providing holistic, planning-based wealth management services. Curtis Hill and Irina Hill lead the firm, bringing extensive expertise as Certified Financial Planner™ and Certified Public Accountant, respectively. They aim to guide clients through complex financial landscapes with innovative solutions and personalized planning.

Founded on the principle of delivering "Not the Same Old Advice," Serenity Wealth Management offers planning-based wealth management services for individuals, families, and small businesses. The firm is known for its educational approach, ensuring clients are well-informed to make strategic financial decisions.

**** About Curtis Hill****

As a Certified Financial Planner™, Curtis brings extensive expertise and a commitment to providing ethical and insightful financial guidance. With rigorous training overseen by the CFP board, Curtis ensures that clients receive top-tier investment advice tailored to their specific needs.

****About Irina Hill****

Complementing Curtis's expertise, Irina Hill, CPA, MBA, plays a crucial role in the firm. Her background as a Certified Public Accountant equips her with the knowledge to offer comprehensive financial planning services. Irina's detailed approach to financial strategies ensures that clients' investments are managed with precision and foresight.

**** Disclaimer****

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