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Prestiq Wealth Introduces the 5 Steps to Retirement Framework to Help Individuals Navigate Complex Financial Decisions

Framework Brings Together Financial Planning, Investment Management, Tax Planning, Estate Planning, and Lifestyle Planning into a Coordinated Strategy

BROOKLYN, NY, UNITED STATES, July 8, 2026 /EINPresswire.com/ -- BROOKLYN, N.Y. July 2026 - As retirement planning grows increasingly complex due to changing tax laws, longer life expectancies, market volatility, and evolving employer benefits, Prestiq Wealth today announced the introduction of its [5 Steps to Retirement Planning Framework]: a comprehensive approach designed to help pre-retirees, retirees, professionals, business owners, and executives make more informed financial decisions.

> Retirement planning is no longer just about building an investment portfolio. Today's investors are making decisions about taxes, retirement income, employer stock and healthcare costs.”
>
> *Louis Green*

Developed by Louis Green, CFA®, CFP®, CRPS®, Founder of Prestiq Wealth and a Wealth Advisor serving clients throughout Brooklyn, New York City, and beyond, the framework integrates five core disciplines that are often addressed separately by investors: [Financial Planning], Investment Planning, [Tax Planning], Estate Planning, and Lifestyle Planning.

The framework was created in response to a growing need for coordinated financial advice. Many individuals accumulate retirement accounts, investment assets, employer stock, pensions, and insurance policies over decades, yet often lack a unified strategy that considers how these pieces work together. Technology employees managing Restricted Stock Units, executives receiving stock options, business owners preparing for an eventual exit, and professionals approaching retirement frequently face tax and investment decisions that can have long-term financial consequences.
The 5 Steps to Retirement Planning Framework is designed to help investors understand how major financial decisions influence one another and how thoughtful planning may support long-term financial goals.

The framework includes:
- Financial Planning: Creating a personalized retirement roadmap based on goals, income

needs, cash flow, and risk tolerance.
• Investment Planning: Building diversified investment portfolios designed to align with long-term objectives and changing market conditions.
• Tax Planning: Evaluating strategies that may improve after-tax outcomes through coordinated retirement, income, and investment planning.
• Estate Planning: Helping individuals and families understand estate planning considerations, legacy goals, beneficiary planning, and wealth transfer strategies.
• Lifestyle Planning: Aligning financial resources with retirement goals, personal priorities, healthcare needs, charitable giving, and quality of life.

Visitors to https://www.prestiqwealth.com/about-us can learn about the 5 Steps to Retirement Planning Framework, request a complimentary copy of 5 Steps to Retirement Planning, schedule an introductory meeting, explore educational articles covering retirement planning, tax planning, investment management, estate planning, and equity compensation, and access videos designed to help individuals better understand today's financial landscape.

"Retirement planning is no longer just about building an investment portfolio," said Louis Green, CFA®, CFP®, CRPS®, Founder of Prestiq Wealth. "Today's investors are making decisions about taxes, retirement income, employer stock, estate planning, healthcare costs, and lifestyle goals, all of which are interconnected."

We developed the 5 Steps to Retirement Planning Framework to help simplify those decisions through a comprehensive, fiduciary approach that puts the client's overall financial picture first."

Prestiq Wealth provides comprehensive wealth management, financial planning, investment management, retirement planning, and tax planning services to individuals, families, professionals, business owners, founders, executives, and retirees. The firm's educational approach emphasizes informed decision-making and personalized planning strategies tailored to each client's unique financial situation.

About Prestiq Wealth
Prestiq Wealth is a Brooklyn-based wealth management firm providing comprehensive financial planning, retirement planning, investment management, tax planning, estate planning, and lifestyle planning services. Founded by Louis Green, CFA®, CFP®, CRPS®, the firm serves pre-retirees, retirees, professionals, business owners, executives, founders, and families seeking personalized financial guidance through a fiduciary approach. Prestiq Wealth's 5 Steps to Retirement Planning Framework integrates financial planning, investment management, tax planning, estate planning, and lifestyle planning into a coordinated wealth management process.

Website: https://prestiqwealth.com
Book: https://amazon.com/author/5stepstoretirement

Schedule a Consultation: https://calendly.com/louis-green-savvy/book-a-meeting-with-louis-green
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Louis Green is an Investment Adviser Representative with Savvy Advisors, Inc. Investment advisory services are offered through Savvy Advisors, Inc. Prestiq Wealth is an independent marketing brand used by Louis Green for advertising and marketing purposes only.

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