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PRESS RELEASE

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Ideal Retirement Solutions Expands Services to Include Estate Planning Through Partnership with Wealth.com

Ideal Retirement Solutions is a financial-planning firm dedicated to helping individuals and families build custom retirement plans tailored to their exact needs. With a holistic approach and ethical client-first philosophy, they offer retirement planning, investment strategies, tax minimization, estate planning, and portfolio management. They are proud to announce the launch of their expanded estate planning service, powered by Wealth.com, the industry's leading digital estate planning platform.

With this partnership, Ideal Retirement Solutions clients now have access to a modern, secure, and attorney-designed estate planning experience, integrated directly into their broader financial plan. The offering includes essential estate planning documents such as wills, trusts, powers of attorney, and healthcare directives, all accessible online and built to evolve with clients' lives



"Estate planning is one of the most important and too often overlooked aspects of financial wellness," said Jeffrey Tamas, CEO and Co-Founder at Ideal Retirement Solutions.

"Through our partnership with Wealth.com, we're making the process more accessible, affordable, and aligned with our clients' broader financial goals."

Wealth.com's platform is built by a team of top estate attorneys and technologists, offering an intuitive digital experience with robust legal infrastructure. Clients can complete their estate plans on their own time, with the confidence that it's built on a foundation of legal integrity and advisor-guided insight.



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