

Retirement Made Reachable

Strategic Retirement Plans clients benefit from a team that walks with them to and through retirement.

“We mostly work with clients that have accumulated their wealth through consistent hard work and smart financial choices,” says Gabe E. Lapito, MBA, CPA/PFS, CFP®, AIF®, owner of Strategic Retirement Plans. “They are people who have built up some savings and investments during their careers, generally between \$1 million and \$3 million in investable assets. Most are three to five years away from retirement. We help them make wise decisions about investing those resources.”

With offices in both Montana and Wyoming, Lapito notes that his firm has many clients who are in the process of retiring from major energy producers including ExxonMobil, Chevron, and Arch Resources, Inc. While many of their clients share similar career backgrounds, their retirement goals are as unique as the individual. Helping clients reach these goals is a team effort.

“A large part of the reason we’ve grown as much as we have over the last decade is because of our team,” Lapito says. “Not every client sees things in the same way, and it’s important to have that variety in approaches. We have a great team of associate advisors and an excellent support staff. As the founder, I tend to get much attention, but it’s not a one-person shop.”



FROM LEFT TO RIGHT: Kaelen Shay, Financial Advisor; Mackenzie Walters, Client Relationship Associate; Gabe Lapito, Owner, Financial Advisor; Ryan Gomendi, Owner, Financial Advisor; Jill Palmer, Director of First Impressions; and Hope Lich, Client Relationship Associate.

The Benefits of Teamwork

“Our personalities and skills complement each other very well,” says Ryan Gomendi, AIF®, CFP®, co-owner of Strategic Retirement Plans. “When markets are tough, Gabe provides a confident stability that is grounded in continual education. Clients need that kind of leadership in tough times. That allows me to lean in with empathy and understanding. Managing portfolios can come with a lot of emotion, and we’re here to help with perspective and peace. You need both strengths and skill sets in our business.”

Gomendi says that clients don’t always realize how much their lives will change as

they transition from working to retirement. As they move further and further away from the security of a steady-paying job, their risk tolerance also changes.

“People can become much more emotional about their investments in retirement,” Gomendi says. “The best way for us to help these clients is to provide them with a great financial plan that meets their goals, no matter what the market is doing.”

As an independent wealth management firm, Strategic Retirement Plans also has the freedom to take a different approach to retirement planning.

“We all have a limited number of days on this Earth, and you don’t get to take anything with you,” says Lapito. “Sharing this perspective with our clients gives them an opportunity to think about the kind of life they really want to have in retirement. That can also mean preparing the next generation to manage and steward these resources. We want our clients’ financial plans to provide a ‘return on life’ for them just as much as they provide a return on investment.”

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