

## Living Legacies

**A**s financial advisors who are fiduciaries, Jennifer and Eric Lahaie have earned the trust of many clients who want to ensure they have the funds needed for retirement and to leave something for their loved ones. Many of their conversations are about inheritances and proper estate planning, but their goal is to help their clients establish something even more precious: a living legacy.

The Lahaies, who have earned the Retirement Income Certified Professional (RICP) designation, contrast investment advising to their specialty, retirement planning. Investment advice is centered around growing assets. Retirement planning takes a more holistic view through the eyes of advisors who are knowledgeable in the areas of growing, preserving, and distributing wealth, along with managing financial risks, taxes, and health care costs. Their focus is for clients to have both the time and the assets to spend comfortably and confidently in retirement.

“We want you to be in a position so that you’re not worried about the market being down twenty or twenty-five percent. The market shouldn’t cause you to put off a big family vacation or limit the freedom to make bucket-list memories you dream of with the people you care about,” Jennifer says.

“Proper estate planning is about making sure what you have goes where you want, when you want, in the most tax-efficient manner possible when you are no longer here.

*Jennifer Lahaie*

Some clients also want the flexibility to assist their children and grandchildren while they are young and getting started. “If you live well into your eighties or nineties, your children may not be receiving assets until they’re in their retirement years—and that may not be when they need it most,” Jennifer says. “Maybe you want to help with the purchase of a first home or your grandchildren’s college expenses—things you can do now.”



**Owners and Founders of JEHM Wealth & Retirement**

Jennifer Lahaie, RICP®, CAS® and Eric Lahaie, RICP®, CFS®  
Investment Advisor Representative

For estate planning, JEHM advisors have relationships with local attorneys who offer complimentary consultations to their clients and aim to help families avoid probate. “Proper estate planning is about making sure what you have goes where you want, when you want, in the most tax-efficient manner possible when you are no longer here,” Jennifer says.

The Lahaies’ thoughtful advice and experience can help you maximize time with loved ones and leave a meaningful legacy. “When I was a little girl, both of my parents worked, and my sister and I would spend weeks with my grandparents traveling the country every summer in their RV,” Jennifer says. “These are some of our most cherished memories. I can assure you it’s not just about leaving a pot of money. The best things you can leave behind are not necessarily tangible, but rather the time spent making memories that can last a lifetime.”



[jehmwealth.com](http://jehmwealth.com)  
864.527.0482

117 Woodruff Place Circle, Suite A,  
Simpsonville, SC 29681