

Federal Seminars & ChFEBC, Inc

Woman Owned Business
399 Perry Street Suite 320
Castle Rock, CO 80104
800-696-3511

FULL-DAY FINANCIAL PLANNING AGENDA

Introductions

- Presenter
- Attendees
- Objectives
- Expectations of the attendees

Financial Planning/Risk Management Issues

- Medical
- Disability
- Long Term Care
- Property & Casualty
- Emergency Fund
- Life Insurance
- Calculating how much you will need in retirement

Break

Estate Planning

- Costs of Silence
- Wills
- Trusts
- Living Wills
- Estate Taxes

Lunch

Your Retirement Budget

- What you want?
- What you have?
- Is there a Gap? (Calculating your projection)

Break

Solutions for your "Gap"

- Psychology of Money
- Save more
- Change your "want"
- Lower debt
- Work longer (maybe self employed)
- Tax savings (Roth, Trade, IRA., etc)
- Increase investment risk and be comfortable

Putting Your Own Financial Plan Together

- To do list and prioritize

End of class