

Half-Day Retirement Strategies Agenda

Introduction

- 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*

Estate Planning

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

Your Retirement Budget

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

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