

Retirement Success Road Map



Discovery/Mindset Shift

- Mindset shift - accumulation vs. income and preservation
- Required vs. lifestyle expenses
- Comfort risk level
- Long-term cash reserves



Financial Road Map Design

- Making the right decisions
- Strategic allocation
- Automatic income increase over time
- Legacy planning



Making it Happen

- Selecting the right financial tools
- Closing financial gaps and loose ends
- Long-term health care considerations
- Estate planning and family considerations