The Retirement Expedition

1
Husband & Wife

Assemble financial data.
Begin retirement planning process.

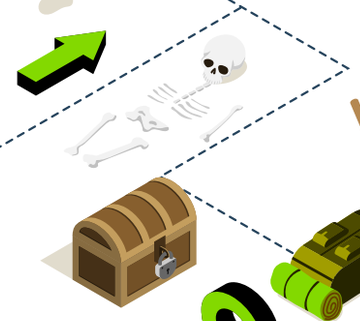
3
Identify Sources of Retirement Income

- Social Security
- Pensions
- Part-Time Job
- Annuity Income
- IRAs
- Company-Sponsored Retirement Plans

5
Uncover the Treasure of Retirement Income

We help you uncover how much income your retirement assets can provide—your financial treasure map.

If withdrawals are needed, we chart a safe path so you don't run out of treasure halfway up the mountain.



2
Determine Retirement Income Needs

Percentage of Current Income –OR– Inflate Current Expenses

4
Locate Income

(IDENTIFY SURPLUS & SHORTFALL)

SURPLUS –OR– SHORTFALL

Proceed to Uncover the Treasure

- Save more for retirement.
- Work part-time during retirement.
- Reduce current expenses.
- Reduce Retirement Spending
- Reallocate assets for higher returns.
- Monitor strategies regularly to ensure retirement goals are being achieved.
- Retire at a later age.

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