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**KEY QUESTIONS
EVERY RETIREE
MUST ANSWER**



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*Retirement
Income
Advisory*

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KEY QUESTIONS EVERY RETIREE MUST ANSWER

Before You Retire, Make Sure You Know:

- 1** Will my money last my lifetime?
- 2** What is the best Social Security claiming strategy for me?
- 3** Is my current asset allocation aligned with retirement income planning?
- 4** How much do I really need to save to retire comfortably?
- 5** What is a safe withdrawal rate for my situation?
- 6** How much income do I need to replace?
- 7** How will rising health care costs impact my plan?
- 8** Should I take my pension as a lump sum or lifetime income?
- 9** Have I planned for longevity beyond average life expectancy?
- 10** Do I have a retirement income shortfall?
- 11** Is my estate plan structured in the most tax-efficient way?
- 12** Is my retirement income plan truly sustainable?

Retirement today **is not your parents' retirement.** Longer life expectancy, market volatility, tax changes, and rising healthcare costs means your **strategy must be intentional.** There is no one-size-fits-all formula.

Complimentary Retirement Income Analysis

In your personalized analysis, we will:

- ✓ Evaluate your income sustainability
- ✓ Review withdrawal strategies
- ✓ Maximize Social Security opportunities
- ✓ Analyze pension options
- ✓ Stress test your plan for longevity and market risk
- ✓ Identify potential retirement income gaps

You will leave knowing whether your plan is built to last.



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**Schedule Your Complimentary
Analysis Today!**

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