RETIREMENT
Design Lab

RETIREMENT DESIGN LAB

The Secret to Building Your Ideal Retirement

An Educational Workshop

Are you looking to retire in the next 5 to 10 years, want to have more confidence, and get a customized plan for your income?

Sound like you?

Worried About:

- Inflation
- Stock market volatility
- Rising cost of health care
- Changes to Medicare, taxes, or Social Security

A RETIREMENT PLANNING WORKSHOP

RETIREMENT DESIGN LAB

What You'll Learn

- Options for creating reliable income in retirement.
- Simple ways to increase your Social Security benefits.
- Strategies to potentially reduce taxes in retirement.
- How to protect and manage your retirement accounts.
- How upcoming government decisions may impact your retirement.

What's Included

- In person classroom session(s).
- In person office hours to discuss your situation.
- In class workbook.
- A customized retirement income plan.

Who Should Attend?

- Those Individuals/couples who want more confidence in their retirement plan.
- Those who are within 5 - 10 years of retirement.
- Those who don't want to leave their retirement to chance.

Why Now?

- Inflation has impacted all of us; how can you deal with it inside of your retirement plan?
- Stock market volatility can strike at any time; are you prepared?
- Changes to taxes, social security, and Medicare could pose a significant concern for those in or nearing retirement.
- Rising costs of health care will likely impact every retiree in some way.

Workshop Topics

Part I - The Foundation

Visualizing Retirement

- Defining your ideal retirement & finding purpose

Navigating Change

- Understanding how retirement planning has evolved

Getting the questions on the table

- When can I retire? Will I run out of money? What if ___?

The Basics & Risk Awareness

- Retirement needs vs. wants - understanding ALL the risks

Part II - From Theory to Practice

The Tools and the Rules

- Understanding your financial accounts & making sense of the rules
- Reducing taxes and managing stock market risks

Planning Your Retirement Income

- Maximizing retirement income – making it predictable
- Understanding guaranteed/non-guaranteed options

Addressing Retirement Risks

- Stock market volatility, rising health care costs
- Long-term care planning, beneficiary decisions

Part III - Office Hours

Office hours are provided by the instructors as an opportunity for you to review and discuss your specific questions about the material covered. This workshop is designed to empower you to take important steps towards planning for a successful retirement. Your instructor has agreed to provide a wide range of days/time availability. These hour-long review sessions are not to be construed as investment advice.

Want to Learn More?

Call: 360-291-8400

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