FocusOn®:

Retirement

I M A G E L I S T

0010 Welcome
0020 Workshop Objectives
0030 Our Commitment
0040 Evaluation Form
0050 About Your Workbook
0060 A Tale of Two Portfolios
0070 Robert's Approach
0080 Karen's Approach
0090 Lesson Learned
0100 Three Keys to Funding a Comfortable Retirement: Determine Your Needs
0110 Determine Your Needs
Bonus calculator
0120 How Much Money Will You Need?
0130 Retirement Age
0140 Length of Retirement
Bonus slide
0150 Health-Care Needs
0160 Inflation
Bonus calculator
0170 Lifestyle
Bonus workbook exercise
0180 How Will You Get There?
0190 Social Security
Bonus slide
0200 Continued Employment Earnings
0210 Personal Savings and Investments
0220 Tax Deferral Can Help Save Money
0230 Employer-Sponsored Retirement Plans
Bonus slide
0240 Individual Retirement Accounts
Bonus slide
0250 Roth IRA
0260 Annuities
0270 Types of Annuities
0280 Taxable Investments
Bonus slide
0290 Sources of Retirement Income
0300 Three Keys to Funding a Comfortable Retirement: Invest Wisely
0310 Invest Wisely
0320 Diversification
0330 Diversification
Bonus slide
0340 Asset Allocation
0350 Personalizing Your Asset Allocation Model
0360 Investment Objectives
0370 Time Frame
0380 Historical Investment Performance
0390 Risk Tolerance
Bonus workbook exercise
0400 Sample Asset Allocation Model: Conservative Investor
Bonus slide
0410 Sample Asset Allocation Model: Aggressive Investor
Bonus slide
0420 Dollar-Cost Averaging
0430 Dollar-Cost Averaging
0440 Keep Expectations in Check
Bonus calculator
0450 Three Keys to Funding a Comfortable Retirement: Protect Your Nest Egg
0460 Two Different Scenarios

FocusOn®:

Retirement

I M A G E L I S T

0470 Protect Your Nest Egg

0480 Start Saving Now

0490 Rebalance Regularly

0500 Annual Review

0510 Prepare for the Unexpected

0520 Life Insurance
Bonus slide

0530 Long-Term-Care Strategy

0540 The Cost of Long-Term Care
Bonus calculator

0550 Three Keys to Funding a Comfortable Retirement

0560 Where Do You Go from Here?

0570 Where Do You Go from Here?

0580 Evaluation Form

0590 What to Bring

0600 Thank You

Bonus features

For Slide 0110:
0610 How Much Would Someone Need? *(calculator)*

For Slide 0140:
0620 Centenarians Grow in Number

For Slide 0160:
0630 Loss of Purchasing Power *(calculator)*

For Slide 0170:
0640 How Much Will You Need to Retire? *(workbook exercise)*

For Slide 0190:
0650 Pensions

For Slide 0230:
0660 Manage Your 401(k)

For Slide 0240:
0670 Traditional IRA

For Slide 0280:
0680 Why Do People Prefer Mutual Funds?

For Slide 0330:
0690 Diversification

For Slide 0390:
0700 How Much Risk Can You Stand? *(workbook exercise)*

For Slide 0400:
0710 Twenty-Year Performance Record: Conservative Portfolio

For Slide 0410:
0720 Twenty-Year Performance Record Aggressive Portfolio

For Slide 0440:
0730 Are Your Expectations Realistic? *(calculator)*

For Slide 0520:
0740 How Whole Life Insurance Works

For Slide 0540:
0750 Calculating the Cost of Long-Term Care *(calculator)*