

FocusOn®:

# Retirement Income

## I M A G E L I S T

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|---|--|
| <b>0010</b> Welcome   | <b>0240</b> Tax Implications of Different Distribution Methods<br><b>Bonus slide</b> |
| <b>0020</b> Workshop Objectives   | <b>0250</b> Lifetime Annuity Payment Options<br><b>Bonus slide</b>                   |
| <b>0030</b> Our Commitment  | <b>0260</b> IRA Rollover<br><b>Bonus slide</b>                                       |
| <b>0040</b> Evaluation Form   | <b>0270</b> Action Items to Chart Your Course – Develop an Investment Strategy       |
| <b>0050</b> About Your Workbook   | <b>0280</b> Asset Allocation<br><b>Bonus slide</b>                                   |
| <b>0060</b> What Does Retirement Look Like at 35?   | <b>0290</b> Sample Asset Allocation Models<br><b>Bonus slide</b>                     |
| <b>0070</b> What Does Retirement Look Like at 50?   | <b>0300</b> Investing in Retirement  |
| <b>0080</b> What Does Retirement Look Like at 60?   | <b>0310</b> Tax-Exempt Investing<br><b>Bonus workbook exercise</b>                   |
| <b>0090</b> Retirement: Beginning a New Voyage  | <b>0320</b> Investing for a Long Retirement  |
| <b>0100</b> What Happens When You Retire?   | <b>0330</b> Income-Producing Vehicles  |
| <b>0110</b> Action Items to Chart Your Course – Size Up Current Situation and Sources of Income | <b>0340</b> Bonds<br><b>Bonus slide</b>  |
| <b>0120</b> Size Up Current Situation   | <b>0350</b> Income Mutual Funds  |
| <b>0130</b> Length of Retirement  | <b>0360</b> Dividend-Paying Stocks<br><b>Bonus slide</b>                             |
| <b>0140</b> Impact of Inflation<br><b>Bonus calculator</b>                                      | <b>0370</b> Reverse Mortgage   |
| <b>0150</b> Lifestyle   | <b>0380</b> Fixed Annuities  |
| <b>0160</b> Primary Sources of Retirement Income  | <b>0390</b> What Kinds of Fixed Annuities Are Available?                             |
| <b>0170</b> Personal Savings and Investments  | <b>0400</b> Annuities Can Provide Fixed, Variable, or Indexed Returns                |
| <b>0180</b> Social Security<br><b>Bonus slide</b>   | <b>0410</b> How Does an Immediate Annuity Work?<br><b>Bonus calculator</b>           |
| <b>0190</b> Lifetime Benefits: Breaking Even  | <b>0420</b> Case Study: The Thompsons  |
| <b>0200</b> Continued Employment Earnings<br><b>Bonus workbook exercise</b>                     | <b>0430</b> Case Study: The Thompsons  |
| <b>0210</b> Action Items to Chart Your Course – Choose a Distribution Method                    |  |
| <b>0220</b> How Long Will a Retirement Portfolio Last?<br><b>Bonus workbook tables</b>          |  |
| <b>0230</b> Identify What to Spend First<br><b>Bonus slide</b>                                  |  |

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## I M A G E L I S T

- 0440** Case Study: The Thompsons
- 0450** Case Study: The Thompsons
- 0460** Action Items to Chart Your Course – Prepare for the Unexpected
- 0470** Case Study: The Wilsons
- 0480** Protect What You Have
- 0490** The Cost of Long-Term Care  
**Bonus calculator**
- 0500** What Are Your Options?
- 0510** Health-Care Costs
- 0520** Filling the Gaps in Medical Insurance  
**Bonus slide**
- 0530** Estate Conservation
- 0540** A-B Trusts Double the Exemption
- 0550** Using an Irrevocable Life Insurance Trust
- 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 0140:*  
0610 Loss of Purchasing Power (*calculator*)
- For Slide 0180:*  
0620 Taxes on Social Security Benefits
- For Slide 0200:*  
0630 How Much Would You Need?  
(*workbook exercise*)
- For Slide 0220:*  
0640 How Long Will Your Savings Last?  
(*workbook tables*)
- For Slide 0230:*  
0650 What's So Great About Tax Deferral?
- For Slide 0240:*  
0660 Tax Implications of a Lump-Sum Distribution
- For Slide 0250:*  
0670 Distribution Alternative Using Life Insurance
- For Slide 0260:*  
0680 Using a Stretch IRA
- For Slide 0280:*  
0690 Historical Investment Performance
- For Slide 0290:*  
0700 Twenty-Year Performance Record
- For Slide 0310:*  
0710 Find Out for Yourself (*workbook exercise*)
- For Slide 0340:*  
0720 Bond Ladders Help Reduce Interest-Rate Risk
- For Slide 0360:*  
0730 Consider Dividend-Yielding Securities
- For Slide 0410:*  
0740 Calculating Income from an Immediate Fixed Annuity (*calculator*)
- For Slide 0490:*  
0750 Calculating the Cost of Long-Term Care (*calculator*)
- For Slide 0520:*  
0760 What Does Medicare Pay For?