

# Building Blocks for Wealthy Living

## I M A G E L I S T

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|------|---|------|--|
| 0010 | Trivia Quiz   | 0350 | <b>Be Ready for Anything</b>                               |
| 0020 | Welcome   | 0360 | Cartoon  |
| 0030 | Why Are These Building Blocks Important?                          | 0370 | Five Areas of Coverage                                     |
| 0040 | Workshop Objectives   | 0380 | Eroding Health Benefits                                    |
| 0050 | <b>Live Within Your Means</b>                                     | 0390 | Health Care: How Much Can You Expect to Spend?             |
| 0060 | Live Within Your Means  | 0400 | Disability   |
| 0070 | Live Within Your Means  | 0410 | Property and Casualty: Homeowners Insurance                |
| 0080 | The More Cash Flow You Have...                                    | 0420 | Homeowners Insurance Quiz                                  |
| 0090 | The Latte Factor  | 0430 | Umbrella Liability Insurance                               |
| 0100 | The \$120,000 Latte   | 0440 | Life Insurance   |
| 0110 | Three Steps to Living Within Your Means                           | 0450 | Many Americans Are Underinsured                            |
| 0120 | Analyze Your Cash Flow  | 0460 | How Much Life Insurance Do You Need? ( <i>calculator</i> ) |
| 0130 | Sources and Uses of Funds   | 0470 | <b>Pay Attention to Taxes</b>                              |
| 0140 | Pay Yourself First  | 0480 | Taxes May Be Your Single Greatest Expense                  |
| 0150 | Starting Now Pays Later   | 0490 | Every Time You Turn Around, It Seems You're Being Taxed!   |
| 0160 | Stay Interested in Interest                                       | 0500 | Taxes  |
| 0170 | How Much Does Your Credit Card Really Cost? ( <i>calculator</i> ) | 0510 | Four Kinds of Taxes  |
| 0180 | <b>Follow Sound Investment Principles</b>                         | 0520 | Taxes Are Constantly Changing                              |
| 0190 | Case Study: Roger and "Company E"                                 | 0530 | Where Will Tax Rates Go from Here?                         |
| 0200 | Case Study: Roger and "Company E"                                 | 0540 | Current Tax-Deferred Vehicles Have Limits                  |
| 0210 | Case Study: Roger and "Company E"                                 | 0550 | What Can You Do?   |
| 0220 | Case Study: Roger and "Company E"                                 | 0560 | <b>Consider Your Estate</b>                                |
| 0230 | Case Study: Roger's Lessons                                       | 0570 | Case Study: Bruce and Anne                                 |
| 0240 | Diversification   | 0580 | Case Study: Bruce and Anne                                 |
| 0250 | Diversification   | 0590 | "Death Is Not the End..."                                  |
| 0260 | Asset Allocation  | 0600 | What Is an Estate?   |
| 0270 | My Asset Allocation Looks Like...                                 | 0610 | What Is Estate Conservation?                               |
| 0280 | S&P 500 vs. Balanced Portfolio                                    | 0620 | Estate Documents   |
| 0290 | Annual Volatility   | 0630 | Beneficiary Designations                                   |
| 0300 | Reallocating a Portfolio  | 0640 | <b>Don't Do It All Yourself</b>                            |
| 0310 | Everyone Expects to Make Money                                    | 0650 | Information Avalanche                                      |
| 0320 | Was There Ever an "Average" Year?                                 | 0660 | Do You Prepare Your Own Taxes?                             |
| 0330 | Keeping Expectations in Check                                     | 0670 | Do You Have a Relationship with a...                       |
| 0340 | Are Your Expectations Realistic? ( <i>calculator</i> )            |      |  |

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## I M A G E L I S T

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|------|-------------------------------------|
| 0680 | Why Work with a Professional?       |
| 0690 | Consider Working with a Pro         |
| 0700 | How Much Time Do You Want to Spend? |
| 0710 | Where Do You Go from Here?          |
| 0720 | Evaluation Form                     |
| 0730 | What to Bring                       |
| 0740 | Thank You                           |