

Running the Retirement Marathon

I M A G E L I S T

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| 0005 | Trivia Quiz | 0320 | Types of Annuities |
| 0010 | Welcome | 0330 | Taxable Investments |
| 0020 | On Your Mark... | 0340 | Be Realistic About All Your Sources of Retirement Income |
| 0030 | Prepare for the Event | 0350 | Anticipate Some Roadblocks |
| 0040 | Develop Core Strengths | 0360 | Sustainable or Unsustainable Course? |
| 0050 | Anticipate Some Roadblocks | 0370 | Growing National Debt |
| 0060 | Prepare for the Unexpected | 0380 | Aging Baby Boomers |
| 0070 | Go the Distance | 0390 | Impending Tax Changes |
| 0080 | Our Objectives | 0400 | Shifting Consumer Attitudes |
| 0090 | Prepare for the Event | 0410 | Dangers of Inflation/Deflation |
| 0100 | If You Have No Goal, How Will You Be Able to Pursue It? | 0420 | Prepare for the Unexpected |
| 0110 | Key Factors Affecting How Much You Will Need | 0430 | Risk Protection |
| 0120 | Retirement Age | 0440 | Types of Risk Protection |
| 0130 | Length of Retirement | 0450 | Issues As We Age |
| 0140 | Health Care | 0460 | Financial Markets Can Be Volatile and Unpredictable |
| 0150 | How Much Could You Spend on Health Care in Retirement? | 0470 | How to Help Lower Your Exposure to Market Risk |
| 0160 | Lifestyle | 0480 | Rebalance Regularly |
| 0170 | Retirement Savings Calculator (<i>calculator</i>) | 0490 | A Tale of Two Portfolios |
| 0180 | How Much Will You Need to Retire? | 0500 | Robert's Approach |
| 0190 | Develop Core Strengths | 0510 | Karen's Approach |
| 0200 | What Income Sources Will You Have When You Retire? | 0520 | Two Different Scenarios |
| 0210 | Social Security's Uncertain Future | 0530 | Keep Expectations in Check |
| 0220 | Pensions | 0540 | Are Your Expectations Realistic? (<i>calculator</i>) |
| 0230 | Continued Employment Earnings | 0550 | Plenty of Opinions...Not Much Help |
| 0240 | Personal Savings and Investments | 0560 | Plenty of Opinions...Not Much Help |
| 0250 | Tax Deferral Can Help Save Money | 0570 | Go the Distance |
| 0260 | Employer-Sponsored Retirement Plans | 0580 | Extending Your Legacy with Life Insurance |
| 0270 | Managing Your 401(k) | 0590 | How Much Life Insurance Protection Do Most People Have? |
| 0280 | Individual Retirement Accounts | 0600 | How Whole Life Insurance Works |
| 0290 | Traditional IRA | 0610 | Survivorship Life Insurance |
| 0300 | Roth IRA | 0620 | Important Estate Documents |
| 0310 | "Do-It-Yourself Pension" with an Annuity | | |

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| 0630 | Consider Establishing a Trust |
| 0640 | Using a Trust to Protect Life Insurance from Federal Estate Taxes |
| 0650 | Keep Your Beneficiary Forms Up to Date |
| 0660 | IRAs: Hidden Value as an Estate Planning Tool |
| 0670 | How a Stretch IRA Works |
| 0680 | Final Mistakes to Avoid |
| 0690 | Trying to Time the Market |
| 0700 | The Cost of Procrastination |
| 0710 | Reach the Finish Line |
| 0720 | Where Do You Go from Here? |
| 0730 | Evaluation Form |
| 0740 | What to Bring |
| 0750 | Thank You |