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KEY QUESTIONS
EVERY RETIREE MUST ANSWER

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Before You Retire, Make Sure You Know:

1. Will my money last my lifetime?
2. What is the best Social Security claiming strategy for me?
3. Is my current asset allocation aligned with retirement income planning?
4. How much do I really need to save to retire comfortably?
5. What is a safe withdrawal rate for my situation?
6. How much income do I need to replace?
7. How will rising health care costs impact my plan?
8. Should I take my pension as a lump sum or lifetime income?
9. Have I planned for longevity beyond average life expectancy?
10. Do I have a retirement income shortfall?
11. Is my estate plan structured in the most tax-efficient way?
12. Is my retirement income plan truly sustainable?

Retirement today **is not your parents' retirement.** Longer life expectancy, market volatility, tax changes, and rising heathcare costs means your **strategy must be intentional.** There is no one-size-fits-all formula.

Complimentary Retirement Income Analysis

In your personalized analysis, we will:

✔ Evaluate your income sustainability

✔ Review withdrawal strategies

✔ Maximize Social Security opportunities

✔ Analyze pension options

✔ Stress test your plan for longevity and market risk

✔ Identify potential retirement income gaps

You will leave knowing whether your plan is built to last.

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Schedule Your Complimentary Analysis Today!

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