

Retirement Investment Strategies

I M A G E L I S T

- | | |
|--|--|
| 0010 Welcome | 0240 Time Frame: Investing in Retirement |
| 0020 Workshop Objectives | 0250 Risk Tolerance
<i>Bonus workbook quiz</i> |
| 0030 Our Commitment | 0260 Asset Allocation |
| 0040 Evaluation Form | 0270 Four Critical Concerns:
Outliving Your Retirement Income |
| 0050 About Your Workbook | 0280 How Long Will Your Retirement Be?
<i>Bonus slide</i> |
| 0060 Wouldn't It Be Nice? | 0290 Funding Retirement: Expectations
vs. Reality |
| 0070 In the Real World... | 0300 Preparing for a Long Retirement:
Identify Financial Needs and
Sources of Income
<i>Bonus workbook exercise</i> |
| 0080 Four Critical Concerns: Taxes | 0310 Savings and Investments |
| 0090 The Top 25% of Taxpayers... | 0320 Employer-Sponsored Plans |
| 0100 What Is Your Federal Income
Tax Bracket?
<i>Bonus workbook exercise</i> | 0321 Tax Implications of Different
Distribution Methods |
| 0110 How to Calculate the After-Tax Yield
<i>Bonus workbook table</i> | 0322 Lifetime Annuity Payment Options |
| 0120 Tax-Favored Investments: Tax Exempt | 0323 IRA Rollover/Transfer
<i>Bonus slide</i> |
| 0121 Tax-Favored Investments: Tax Deferred
<i>Bonus slide</i> | 0324 Required Minimum Distributions |
| 0122 Investment Taxes to Consider | 0325 Qualified Longevity Annuity Contract |
| 0130 Four Critical Concerns: Inflation | 0330 Social Security
<i>Bonus slide</i> |
| 0140 Inflation | 0331 How Claiming Age Affects
Social Security Benefits |
| 0150 Loss of Purchasing Power
<i>Bonus workbook exercise</i> | 0340 Employment
<i>Bonus slide</i> |
| 0160 Four Critical Concerns:
Investment Portfolio Management | 0350 Preparing for a Long Retirement:
Protect Your Assets |
| 0170 A Tale of Two Portfolios | 0360 Health-Care Costs Increasing |
| 0180 Bear Market Retiree | 0370 Retiree Health Benefits Eroding
<i>Bonus slide</i> |
| 0190 Bull Market Retiree | |
| 0200 Lessons from the Two Portfolios | |
| 0210 How Do You Succeed?
Develop a Sound Strategy | |
| 0220 Investment Objectives | |
| 0230 Time Frame
<i>Bonus slide</i> | |

Retirement Investment Strategies

I M A G E L I S T

- 0380** Filling the Gaps in Medical Insurance
- 0390** Paying for Long-Term Care
- 0420** Preparing for a Long Retirement:
Recognize and Avoid Common Pitfalls
- 0430** Dependent on Single-Life Annuity
- 0440** Dependent on Single-Life Annuity
Bonus slide
- 0450** Too Conservative
- 0460** Too Conservative
- 0470** Single Investment Portfolio
Bonus slide
- 0480** Single Investment Portfolio
- 0490** Too Many Fully Taxable Investments
- 0500** Too Many Fully Taxable Investments
- 0510** Four Critical Concerns
- 0520** Where Do You Go from Here?
- 0530** Where Do You Go from Here?
- 0540** Evaluation Form
- 0550** What to Bring
- 0560** Thank You

Bonus features

For Slide 0100:

- 0570** What Is Your Federal Income Tax Bracket?
(workbook fill in the blank)

For Slide 0110:

- 0590** Find Out for Yourself (workbook table)

For Slide 0121:

- 0600** Taxes Make a Difference

For Slide 0150:

- 0630** Figuring Out the Net Yield After Taxes and
Inflation (workbook exercise)

For Slide 0230:

- 0640** Historical Investment Performance

For Slide 0250:

- 0650** How Much Risk Can You Stand?
(workbook quiz)

For Slide 0280:

- 0660** Centenarians Grow in Number

For Slide 0300:

- 0670** How Much Would You Need?
(workbook exercise)

For Slide 0323:

- 0675** Using a Stretch IRA

For Slide 0330:

- 0680** Taxes on Social Security Benefits

For Slide 0340:

- 0690** Will You Be Able to Work?

For Slide 0370:

- 0700** Worry Over Health Care

For Slide 0440:

- 0730** Income for a Surviving Spouse

For Slide 0470:

- 0740** Lessons from Enron