

## ARE YOU ON TRACK?

When and how to retire are the most important financial decisions you'll have to make. But how do you know if you're ready? **Retirement Readiness** will give you the *clarity* and *confidence* to prepare for and eventually enter into retirement.



# RETIREMENT Readiness CONSULTING



## HOW IT WORKS:

1. Introduction conversation and data gathering: 30-45 minutes
2. Implementation discussion: 60 minutes
3. Mid-year follow up: 15-20 minutes
4. One-year (or as needed) follow up: 15-20 minutes

## PACKAGE DELIVERABLES:

- Retirement income sources (savings, social security, pension, etc.)
- Retirement paycheck projection
- Retirement expense projection
- Gap analysis and action steps to help you reach your retirement goals

## **ACTION PLAN:**

- Collaboration with Independent Financial Advisor
- Risk tolerance aligned with saving and spending needs
- Access your plan and progress anytime using the eMoney planning software
- Additional services are available and can be added to meet specific interests and needs



**CALL NOW**

800-327-4692