Snow Federal Retirement Seminars & ChFEBC℠ , LLC
PO Box 1567
Elizabeth, CO 80107
800-696-3511

Half-Day Retirement Strategies Agenda

Introduction
- Presenter
- Attendees
- Objectives
- Expectations of the attendees

Financial Planning/Risk Management Issues
- Medical
- Disability
- Long Term Care
- Property & Casualty
- Emergency Fund
- Life Insurance
  - *Calculating how much you will need in retirement*

Estate Planning
- Costs of Silence
- Wills
- Trusts
- Living Wills
- Estate Taxes

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Your Retirement Budget
- What you want?
- What you have?
- Is there a Gap? (*Calculating your projections)*

Solutions for your "Gap"
- Psychology of Money
- Save more
- Change your "want"
- Lower debt
- Work longer (*Maybe self employed)*
- Tax savings (*Roth, Trade, IRA,. Etc)*
- Increase investment risk and be comfortable

Putting Your Own Financial Plan Together
- To do list and prioritize

End of Class