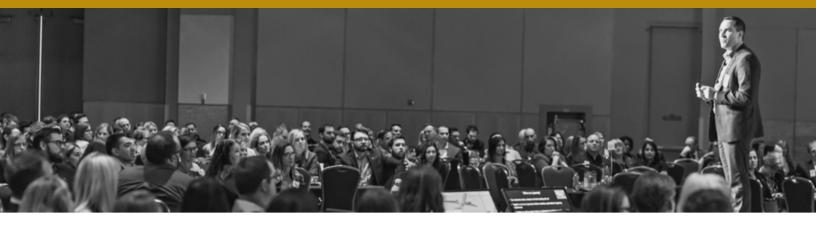


WORKBOOK

Discover 5 Essential Action Steps To Live With More Certainty About Retirement

with Michael Hakoun

WELCOME TO THE NAVIGATE RETIREMENT WITH CONFIDENCE WORKSHOP



DEAR WORKING PROFESSIONAL / BUSINESS OWNER THINKING ABOUT RETIREMENT OR RETIREE,

You probably are asking yourself: Will I have enough to live the life I want?

We know that one of the greatest struggles for people who are approaching or in retirement is ensuring they will not run out of money. So often you are watching the news or talking with friends and while thinking about the future, this same fear of not having enough repeats itself.

Are you hoping one day to finally find peace of mind, feel confident and know that you're going to be ok in my retirement?

The uncertainty around whether you will have enough for retirement is about to change...

We created the Navigate Retirement with Confidence Workshop to help those approaching and in retirement discover the peace of mind you've been looking for, without the stress of trying to navigate on your own.

Over the past 30 years, we've helped over a 1000 clients reach their financial goals and starting on February 13th, this is your opportunity to do the same in an interactive experience.

BY THE END OF OUR TIME TOGETHER, YOU'LL KNOW THE 5 ESSENTIAL ACTION STEPS TO LIVE WITH MORE CERTAINTY ABOUT RETIREMENT.

DAY 1

The Psychology of Successful Retirement - Finding Purpose in your next chapter

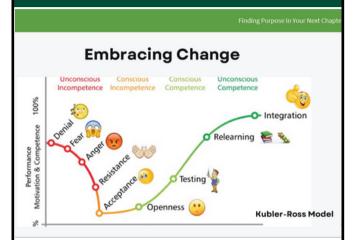
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5 DAY WORKSHOP

Homework:

- 1.What is your biggest personal mindset challenge in thinking about retirement?
- 2.What emotions come up when you think of transition associated with retirement?
- 3.What purpose would you like to connect with in your retirement years?
- 4.What is one behavior that will serve you well as you navigate the retirement journey?

ESSENTIAL ACTION STEP



WHAT IS MY KEY TAKEAWAY FROM THIS SESSION?

DAY 2

How one simple action can help you identify gaps and better prepare you for the future

NAVIGATE RETIREMENT WITH CONFIDENCE

5 DAY WORKSHOP

Homework: Take the time to complete your own	ESSENTIAL ACTION STEP	
retirement formula	The one simple action that can help you identify gaps • Take the time to complete your own Retirement formula Do I have enough?	
	WHAT IS MY KEY TAKEAWAY FROM THIS SESSION?	
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The top 5 mistakes investors make and NAVIGATE RETIREMENT how to avoid them WITH CONFIDENCE

5 DAY WORKSHOP

LEDYARD

lomework: Think about the last few investment decisions You made. Where did your information come	ESSENTIAL ACTION STEP
rom? Was it reliable and from credible	The top 5 mistakes investors make
How can you improve your inputs so that they can make better investment decisions.	1. Getting in and out of the market at the wrong time 2. Investing in what is popular 3. Not managing investment costs judiciously 4. Basing decisions on bad information 5. Building portfolios one interesting investment at a time
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	WHAT IS MY KEY TAKEAWAY FROM THIS SESSION?
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DAY 4

Tax planning considerations to optimize your personal situation

NAVIGATE RETIREMENT WITH CONFIDENCE

LEDYARD

5 DAY WORKSHOP

nework: Write down your top tax Ining concerns with retirement wha we help you with to be better prepar	t ESSENTIAL ACTION STEP
we neip you with to be better prepar	Tax Planning to Optimize your Personal Situation 1. Tax Planning before Retirement 2. Distributions
	WHAT IS MY KEY TAKEAWA FROM THIS SESSION?
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The power of scenario planning and how this can help you navigate Retirement

NAVIGATE RETIREMENT WITH CONFIDENCE

5 DAY WORKSHOP

Homework: Reflect on the scenario planning scenarios reviewed. What concerns do you have about the future that can we help you pre-experience through our scenario planning Live Well Retirement Roadmap?	We've done the homework How do we pull it all together? Have my Needs, Wants, Wishes Did the 4% formula Know my gap Ready for a healthy investment "diet"
	WHAT IS MY KEY TAKEAWAY FROM THIS SESSION?
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