

RETIRE NOW

Income for life

How to create income and protect your hard-earned money from uncertainty. We will be able to assist you to make this happen.



This is an insurance and annuity sales presentation

CONCERNS (CHECK ALL THAT APPLY)

The characters in this example are fictional only. Your actual experience will vary.

- Running Out of Money
- Stable Income in Retirement
- Survivor Benefits
- Stock Market Volatility
- Longevity
- Parents/Children
- Long Term Care or Prolonged Illness
- Health Issues

WHEN DO YOU PLAN ON RETIRING?

Name	A	B
Current age		
At what age do you plan on retiring?		
If you could do so sooner, would you?		

WE NEED TO ASK WHERE IS OUR INCOME GOING TO COME FROM?

Account Type	Account Holder	Qualified(Q) Non-Qualified (NQ)	Balance
401k			
401k			
IRA			
IRA			
Savings/CD			
Brokerage Account			
Total			



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WHAT IS YOUR DESIRED MONTHLY INCOME IN RETIREMENT?

- Let's add up all of our guaranteed sources of income like pensions and Social Security and see if we need additional income...

FIGURING YOUR INCOME

How would you like more income? Would you like your spouse to have 100% survivor benefit?

Your Social Security	\$ _____
Spouse Social Security	\$ _____
Pension income	\$ _____
Survivor Benefit %	\$ _____
Total Income	\$ _____

NOW LET'S LOOK AT YOUR INCOME...

Your Social Security \$ _____
Spouse Social Security \$ _____
Pension Income \$ _____
Total Income \$ _____
+ New Income \$ _____
New Total Income \$ _____