

Retirement Planning

Retirement is one of the most significant changes in your life. How will your lifestyle be impacted? What will you do with your remaining lifetime? The many aspects of this major transition can be overwhelming.

Transition Planning, Inc. can help you methodically consider the critical details so you can make informed decisions for a more positive outcome potential. These are the services offered:

- Discussion of retirement date and lifestyle goals
- Review of employer retirement benefits
 - Deferred Compensation Plan
 - Stock Option Strategy
 - Pension Payout Option Analysis
 - 401(k), 403(b), 457 Plan, etc. options
 - Other Key Employee Benefits
- Health Insurance Review
- Determination of optimal Social Security Income start date
- Summary of all Income Sources
- Discovery of Values-based Goals (Who do you want to benefit and why? What do you want to happen?)
- Summary of Prioritized Goals with
 - Time frame
 - Money needed
- Feasibility Analysis for achieving goals
- Existing Portfolio Asset Allocation
- Completion of FinaMetrica Risk Profile
- Current Balance Sheet

- Asset Ownership Review
- Beneficiary Designation Review
- Analysis of current situation (What will happen without changes?)
- Consideration of special needs (Parents, Children, Grand-Children, Health Issues, etc.)
- Discussion of Income Tax Control Options
- Proposed Investment Policy Statement
- Evaluation of options for Transitioning Out of a Business

Planning ahead several years in advance of this important transition can produce a more positive experience. No matter where you are in the process, some professional input can be helpful. You may also have friends or relatives who could benefit from these services.

It is easy to get started. Simply complete our secure online confidential questionnaire so we can schedule a time to meet and discuss who and what is important to you at this time.

After you have submitted your questionnaire, we will contact you to schedule a 60-minute complimentary consultation to determine what your needs are, how we might work together, and if our relationship is the right fit for you. Upon mutual agreement, we will either continue working with you or refer you to other appropriate professionals.

Your ultimate success is up to you, and is our greatest desire. We look forward to hearing from you soon!