



VIDEO TITLE: Pre-Retirement Checklist

Target Audience: Prospects, Clients, COI's

Estimated Total Runtime: 2:05

Strategy: Post on website, social media, send in email

[Supers: Eric B. Soiland, CFP®, CIMA®, CIMAC®
Managing Director, Presidio Group Wealth Management
[Eric]

Retirement: it can be an exciting chapter of life, but it also requires careful planning.

Even before you retire, it's crucial to identify available sources of income as well as your projected living expenses and cash flow needs in retirement.

As you approach retirement, consider these 5 crucial questions: [FS with underlined words]

- 1) What are the threats to your retirement? Consider Market Volatility, Spending Behavior, Inflation, Taxes, Unexpected costs... as well as longevity.
- 2) When should you start taking Social Security? Timing matters for maximizing benefits.
- 3) What are your possible healthcare expenses and long-term care costs?
- 4) How much can you spend in retirement? Assess whether there's a gap or surplus in your current plan.
- 5) How should you invest during retirement? Plan ahead for varying market conditions and tax scenarios.

Let us help you write your retirement story with our LifeSyncSM experience.

Every retirement is different, and yours will be yours alone — your unique story. We can help you write it by discovering what matters most to you and putting together a plan to help you achieve it. Because your retirement isn't your last stop; it's just the first chapter in a brand-new story.

We can help you define your unique retirement story with our LifeSync experience. LifeSync provides an approach to advice and planning that continuously syncs your financial objectives with your personal aspirations and values throughout the many moments in your life — including your retirement.

Even when life throws you curveballs, we're here to help you stay on track toward your retirement destination.

Give us a call, and let's navigate this journey together.

PM-09202026-7768105.1.1
