

Video Title: Five questions you should answer before you retire

Estimated total runtime: <1:00

[LT: Eric B. Soiland, CFP®, CIMA®, CIMC®

Managing Director

Presidio Group Wealth Management]

[Eric]

If you're nearing retirement, you've probably asked yourself: "*Am I missing anything?*" Here are five critical questions to help you feel more confident about the road ahead.

One – What are the biggest threats to my retirement?

It might be market swings, inflation, healthcare costs—or simply outliving your money.

Two – When should I take Social Security?

There are pros and cons to starting early or waiting for a bigger benefit.

Three – What will my healthcare costs be?

It's often more than you think.

Four – How much can I spend without running out?

Start by tracking your expenses. Then compare that to your income.

And Five – How should I invest in retirement?

You need the right balance of growth and income.

Let's review your plan— so we can see if you're properly diversified and help you create an income stream that you can't outlive.

Custom Thumbnail Caption: Are You Really Retirement Ready?

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Email Subject Line: VIDEO: Are you asking these 5 crucial questions about retirement?

Email Copy:

If you're planning for retirement, there are five key questions I believe everyone should answer before they take the leap.

From Social Security timing to investment allocation, these questions can help reveal whether you're on track—or if something's missing.

Take a minute to watch this quick video.

[Thumbnail hyperlinked to video]

If you're concerned about how you answered these questions, let's talk. Reach out for a free risk analysis and retirement planning session.

[Add 'Schedule a meeting with me' link]

Social Tease:

Not sure if you're truly ready to retire?

These five questions can help you uncover what's working—and what might need a second look.

Watch now and let's talk about what your answers reveal.

#RetirementPlanning #IncomeStrategy #FinancialConfidence

[Direct Upload mp4 file]

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Website Blog/YouTube Title: The 5 Retirement Questions You Need to Answer

Website Blog/YouTube Copy:

Before you retire, it's essential to evaluate your financial picture through five key questions:

- What are the biggest threats to your retirement income?
- When should you claim Social Security?
- What will healthcare actually cost?
- How much can you safely spend?
- And how should you be investing now?

Answering these can help you avoid costly surprises and move forward with clarity. If you'd like help reviewing your answers and building a plan around them, reach out today.

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