

Your Winning Retirement Plan Meeting Agenda

Topic: **Chapter 4 – Return on Investment**

Date: **Sunday, February 20th**

Time: **4pm – 5pm Mountain Time**

Meeting Link: <https://azgov.webex.com/azgov/j.php?MTID=m63e13cf27c3fdf28e1f9bec2296699f5>

Meeting Number: **2466 611 8392**

Password: **RMknCx3e2Z4**

Join by Phone: **877-309-3457** Access Code: **2466 611 8392**

Note: Meetings start promptly at the hour, please try to log in a few minutes before the meeting.

Preparations

Statements from your investment plans including 401k, IRA, Investment accounts, etc. will be needed to perform your analysis on your investments.

Summary

This chapter is focused on the concept of Return on Investment (ROI) aka Returns. This may be the single most important input in your retirement planning and execution, so it is vital you understand how it works and how important it is to try to get as accurate measure and estimate of this value to be used in your calculations. This chapter also covers how to measure performance of your investments to determine if a new strategy is in order.

Agenda

- **Chapter 4 – Return on Investments**
 - What is Return on Investment?
 - Are You Investments Good Choices or Dogs?
 - Using Real Returns in Your Retirement Planning
 - Reverse Dollar Cost Averaging
 - Be Wary of Compound Growth Projections!
- **10 Minutes Open Discussion**

Resources

- [Chapter 4](#) (PDF Download)
- [Chapter 4 Spreadsheets](#) (Excel file)
- [Meeting Agenda](#) (PDF Download)
- ArtCentrics.com
 - [Money Matters page](#) – See past discussions, download and view video and associated materials.
 - [Your Winning Retirement Plan page](#) – Resources for this set of discussions.