

Your Winning Retirement Plan Meeting Agenda

Topics:

- **Interlude – Index Fund Investments**
- **Chapter 5 – Preretirement Planning Gates 1 & 2**

Date: **Sunday, February 27th**

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

Summary of retirement savings, current wage information, Social Security statement, any pension plan information and other accounts associated with your retirement (ie annuities). Information on your expenditures for your current and retirement lifestyle (ie Utility expenses, food, clothing, insurance, gifts, prescriptions, mortgages, real estate taxes etc.)

Summary

Before diving into chapter 5 we will briefly review a couple of papers originating from the American Association of Individual Investors that address Asset allocation and diversification, identifying a number of approaches and index funds that can be utilized to build your portfolio.

Diving into chapter 5 is where the rubber hits the road. We are introduced to a number of worksheets used to determine your current retirement situation, how to determine your future needs, and finally how to determine the type of lifestyle to expect in retirement. We also discuss how to evaluate an early retirement offer if your company offers you one. Finally, this chapter discusses options on what you might consider to meet the lifestyle you want in retirement if your current situation doesn't appear to support the lifestyle in retirement you would like.

Agenda

- **Interlude – Index Fund Investments**
 - Paul Merriman: [Which Is the Best 1, 2, 3 and 4 Fund Strategy](#)
 - Chris Pedersen: [Simple & Effective Balanced Portfolios for Lifetime Investing Success](#)
 - [Asset Allocation Models to Maximize Your Returns](#)
- **Preretirement Planning**
 - Gate 1: Quick and Dirty
 - Gate 2: Assess Your Future Needs
- **10 Minutes Open Discussion**

Resources

- [Chapter 5 Part 1](#) (PDF Download)
- [Chapter 4 Spreadsheets](#) (Excel file)
- [Meeting Agenda](#) (PDF Download)
- American Association of Individual Investors
 - Paul Merriman: Which Is the Best 1, 2, 3 and 4 Fund Strategy
 - [Recording](#) (MP4)
 - [Supporting Document](#) (PDF)

Your Winning Retirement Plan

Meeting Agenda

- Chris Pedersen: Simple & Effective Balanced Portfolios for Lifetime Investing Success
 - [Recording](#) (MP4)
 - [Supporting Document](#) (PDF)
- [Asset Allocation models to Maximize Your Returns](#)
- [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.