

Your Winning Retirement Plan Meeting Minutes

Topics:

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

Pages Covered: (139 - 160)

Date: **Sunday, February 27th**

Time: **4pm – 5pm Mountain Time**

Resources

- Meeting Recording (MP4): [Link](#) (60 minutes)
- Meeting Agenda(PDF): [Link](#)
- Chapter 5, Gates 1, 2 Discussion(PDF): [Link](#)
- Meeting Minutes(PDF): [Link](#) (This document)

Meeting Minutes

- **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

Supplemental Material

More information on topics mentioned in our meeting:

- **Healthcare cost in retirement**
 - Medicare may only cover 51% of health care cost
 - Various studies indicate healthcare cost for a married couple (not covered by Medicaid)
 - Will range between \$400,000 - \$650,000 over your lifetime
 - \$220,000 for 20 years in retirement
 - Current estimated inflation rate for healthcare are estimated at about 6%.
 - References
 - AARP: [Health Care Cost in Retirement](#)
 - Consumer Reports: [Plan to Manage Medical Expenses When You Retire](#)
 - [2021 Retirement Healthcare Cost Data Report](#) (PDF)
 - Annuity.org: [Health Care Cost in Retirement](#) (web page)