

Your Winning Retirement Plan Meeting Agenda

Topic: **Spending in Retirement**

Date: **Sunday, March 13th**

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

We will be referencing previous worksheets in addition to many more financial bits of information including a list of one-time expenses, expected tax rates in retirement, expected Pensions, Social Security, and other financial data we have previously referenced.

Summary

This chapter details the process of planning, executing and maintaining a budget in retirement. It shows how using the Autopilot method can be used to ensure you have adequate funds to keep the same lifestyle that you have projected in your pre-retirement planning. It also helps identify the order you should tap accounts in the spend-down phase of your retirement.

Agenda

- **Spending in Retirement – Part 1**
 - Gate 1: [Understanding the Fundamentals](#) – Forecasting your future needs.
 - Gate 2: [Organizing Your Inputs to the Plan](#) – Integrate one time expenses in your plan.
 - Gate 3: [How Much Can You Afford to Spend?](#) – Determine how much you can spend each year for normal living expenses.
 - Gate 4: [The Retiree's Autopilot?](#) – Review of autopilot parameters that can be adjusted to smooth out market gyrations.
 - Gate 5: [Staying on Track](#) – Steps to ensure you keep to your plan in previous gates.
 - Gate 6: [Always Look Ahead](#) – Live events to keep in mind including critical dates, estate planning etc.
- **10 Minutes Open Discussion**

Resources

- [Chapter 6 Part 1](#) (PDF Download)
- [Chapter 6 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.