

Your Winning Retirement Plan Meeting Minutes

Topic: **Chapter 6 - Spending in Retirement** Pages Covered: (197 - 241)

Date: **Sunday, March 13th**

Time: **4pm – 5pm Pacific Time**

Resources

- Meeting Recording (MP4): [Link](#) (56 minutes)
- Meeting Agenda(PDF): [Link](#)
- Chapter 6, Spending in Retirement Discussion(PDF): [Link](#)
- Meeting Minutes(PDF): [Link](#) (This document)

Meeting Minutes

- **Spending in Retirement**
 - 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**

Supplemental Material

More information on topics mentioned in our meeting:

- [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.