

# Your Winning Retirement Plan Meeting Agenda

Topic: **Chapter 3, Part 1 – Investments**

Date: **Sunday, January 30<sup>th</sup>**

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

Gather your latest account statements for all assets that will be utilized in your retirement plan, 401k, IRA, Roth, 357, 401a, Bonds, Money Market Funds, Annuities, etc. This information will be used to determine what your current asset allocation is.

## Summary

We covered new terms last week for this chapter, so now we are diving into the content of the chapter. This chapter is used to introduce the reader to many basic investment and planning concepts. It identifies the various types of investments (ie stocks, bonds, etc) the various types of accounts (ie vehicles) created for holding these investments and finally introduces the concept of Asset Allocation, a process of distributing your investments across various risk level investments to minimize risk and maximize gains. The importance of placing investments in the appropriate vehicles to minimize tax implications is also discussed. Finally some thoughts on the appropriate approach to creating a plan and implementing it based on the level of involvement you desire are discussed.

## Agenda

- **Minutes Review from last week**
- **Chapter 3 – Investments**
  - Chapter Summary
  - Terms and Concepts
  - Owners and Lenders
  - Asset Allocation
  - Vehicles
  - Allocating within Vehicles
  - Making Smart Investments
  - Real Estate
  - But I Want to Relax
  - Chapter Closing Thoughts
- **10 Minutes Open Discussion**

## Resources

- [Chapter 2 Part 2 & Chapter 3](#) (PDF Download)
- [Chapter 3 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.