

Your Winning Retirement Plan Meeting Minutes

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

Pages Covered: **(61 - 84)**

Date: **Sunday, January 30th**

Time: **4pm – 5pm Mountain Time**

Resources

- Meeting Recording (MP4): [Link](#) (60 minutes)
- Meeting Agenda(PDF): [Link](#)
- Chapter 3, Part 1 Discussion(PDF): [Link](#)
- Meeting Minutes(PDF): [Link](#) (This document)
- Schwab: [Roth Conversion Calculator](#)

Meeting Minutes

- **Chapter 3 Discussion (00:00 – 58:00)**
 - Owners and Lenders
 - Asset Allocation
 - Vehicles