

# Your Winning Retirement Plan Meeting Agenda

Topic: **Chapter 3 Part 2, Chapter 4 Part 1**

Date: **Sunday, February 6<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 wrap up chapter 3 with Vehicles and allocating investments within the various vehicles. Continuing on to chapter 4, we focus on the concept of Return on Investment (ROI) aka Returns. This may be the single most important input in your retirement planning and execution, so it is vital you understand how it works and how important it is to try to get as accurate measure and estimate of this value to be used in your calculations. This chapter also covers how to measure performance of your investments to determine if a new strategy is in order.

## Agenda

- **Chapter 3 Continued – Investments**
  - Vehicles
  - Allocating within Vehicles
  - Making Smart Investments
  - Real Estate
  - But I Want to Relax
  - Chapter Closing Thoughts
- Chapter 4 – Return on Investments
  - What is Return on Investment?
  - Are You Investments Good Choices or Dogs?
  - Using Real Returns in Your Retirement Planning
  - Reverse Dollar Cost Averaging
  - Be Wary of Compound Growth Projections!
- **10 Minutes Open Discussion**

## Resources

- [Chapter 3 Part 2 & Chapter 4](#) (PDF Download)
- [Chapter 3 Spreadsheets](#) (Excel file)
- [Chapter 4 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.