

Your Winning Retirement Plan Meeting Agenda

Topic: **Preretirement Planning Gates 3, 4 & 5**

Date: **Sunday, March 6th**

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

Your latest Social Security statement. Details on any pension plan or annuity you may have. Information on cash flow from any real estate investments you may have (ie rentals). List of any major purchase you plan during retirement (ie RV, vacation home, new car, etc).

Summary

We continue chapter 5 with a discussion on Social Security, identifying some of the benefits and factors that should be considered when trying to determine the age you would like to begin receiving benefits. We also briefly discuss how to incorporate any pension or annuities you may have into your retirement plan. Finally, we dive into the Preretirement Worksheet to determine if you are on schedule to meet your retirement goals or if you need to make adjustments to your savings, or modify your targeted retirement date.

Agenda

- **Preretirement Planning – Part 2**
 - Gate 3: Estimating Your Social Security, Pension and Annuity Income
 - Gate 4: Planning with the Retirement Autopilot
 - Gate 5: Just Before Retirement
 - How can I improve my retirement benefits?
 - Fine tuning your retirement date
 - Are you faced with an early retirement decision
- **10 Minutes Open Discussion**

Resources

- [Chapter 5 Part 2](#) (PDF Download)
- [Chapter 5 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.