



HIS SOCIAL SECURITY \$  
 HER SOCIAL SECURITY \$  
 PENSION #1 \$  
 PENSION #2 \$  
 PIRA \$  
 INVESTMENTS \$

Please Review  
 "Five Steps Detailed"



- ☐ Soc Sec Stmt
- ☐ Pension Projections
- ☐ 401K & IRA Stmt
- ☐ Life Insurance Stmt
- ☐ Investment & Mfd Stmt
- ☐ Brokerage Statements
- ☐ Bank Account Stmt
- ☐ Trusts & Wills
- ☐ Beneficiaries & EduCare
- ☐ POAHC & HCD
- ☐ Mortgage & CC Stmt

- ☐ ~~Projection~~
- ☐ Cost of living
- ☐ HealthCare COL
- ☐ Income taxes
- ☐ Future values
- ☐ Value of estate

- ☐ From inflation
- ☐ From bear market
- ☐ From investment fees
- ☐ From income taxes
- ☐ From capital gains tax
- ☐ From opportunity costs
- ☐ From healthcare costs

- ☐ Soc Sec when/how much
  - ☐ Pension decisions
  - ☐ Monthly Mailbox Money®
- Red — 7%  
 Yellow — 2%  
 Green — 2%  
 Abundant Resources

- ☐ ~~Perpetuate~~
- ☐ Bene deed(s)
- ☐ Bene TOD
- ☐ Probate protection
- ☐ Estate Tax Eliminated
- ☐ HealthCare financed
- ☐ Living Trust(s)
- ☐ Pour-over will(s)
- ☐ POAHC(s)
- ☐ HealthCare Directive(s)
- ☐ TrueWealth systematized

### FIVE STEPS TO TRUEWEALTH

One of our core values at **WEALTHCARE** is Living a Life of **ABUNDANCE**. Whatever abundance means to you, by its very definition it means "more." More time with your grandchildren, more vacations, more time for your hobbies or reading, more control over your life and your time. Our involvement in designing your retirement is all about giving you more, so you can live a life of abundance. **TRUEWEALTH** doesn't consist of more money, or more stuff. Instead, it's comprised of those things that money can't buy, and death can't take away like meaningful relationships, incredible experiences of a lifetime, and memories made with family and friends. What we do in designing a retirement is to provide more abundance in terms of money and time, so you can accumulate **TRUEWEALTH**. ~~Wealthcare has a process, we call~~ Five Steps to **TRUEWEALTH** that help you to organize and structure your retirement so you can have more of what money can't buy and death can't take away.



THESE FIVE STEPS ARE PROVEN, AND WE'LL GUIDE YOU CAREFULLY ALONG EACH STEP OF THE WAY TO INSURE THAT IN THE END, YOU CAN EXPERIENCE THE MOST ABUNDANT LIFE POSSIBLE.

Red — 7%  
 Rate: Yellow — 2%  
 Green — 2%

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