

RETIREMENT INCOME PLANNING

GET TO KNOW EACH OTHER

GOALS, EXPECTATIONS,
OBJECTIVES



ONGOING MONITORING & REVIEW

WHAT WILL WE DO WHEN
WE REVISIT THE PLAN?



ESTIMATE RETIREMENT INCOME NEEDS

PROJECTING SPENDING
AND EXPENSES



IMPLEMENT THE PLAN

PREPARE FOR
TRANSITION



AVAILABLE RESOURCES

ON-GOING INCOME,
IMMEDIATE LUMP SUM
NEEDS, ETC.



KEY DISTRIBUTION STRATEGIES

MITIGATING RISKS AND
OPTIMIZING THE PLAN



PROBABILITY OF SUCCESS

IS IT ENOUGH?



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