

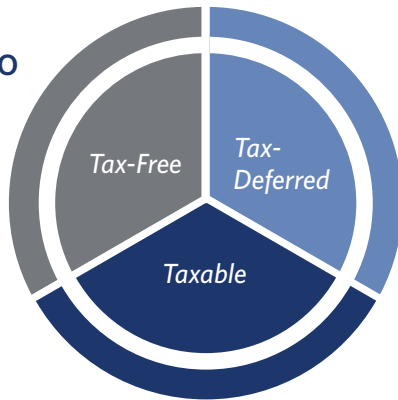
RETIREMENT INCOME PLANNING

Creating Sustainable Cash Flow for Your Lifestyle

As you enter retirement, one of the most important questions to answer is: *“Do I have enough?”* This handout is designed to help you visualize where your retirement income will come from, how to create a reliable withdrawal strategy, and how to manage your assets wisely over time. With thoughtful planning, tax diversification, and ongoing portfolio reviews, you can approach retirement with clarity and confidence.



IS YOUR PORTFOLIO TAX DIVERSIFIED?



RETIREMENT INCOME SOURCES

- Traditional 401k/IRA
- Brokerage Accounts
- Passive Investments
- Social Security
- Roth 401k/IRA
- Pension
- Other Income

Retirement Plan Inventory Use this Retirement Plan worksheet to understand where your income will come from, how it’s taxed, and how long it may last—helping you plan and withdraw with confidence.

Account Type	Account Owner	Current Balance	Tax Treatment	Notes
<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
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<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
Other Income Sources	Owner (start age)	Annual Amount	Tax Treatment	Notes
<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____
<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____	<input type="checkbox"/> _____

RETIREMENT DOESN'T HAVE TO BE UNCERTAIN — with the appropriate plan, you can turn your savings into steady, reliable income.



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