

FOUR PILLAR PLANNING

Client:

Date:

Assets:

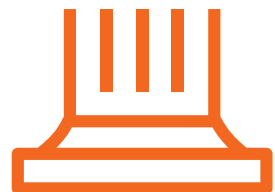
AN APPROACH TO RETIREMENT PLANNING THAT PROVIDES:

- Ready access to cash for emergency purposes
- Stable, predictable income throughout retirement
- Liquid funds for unforeseen large expenses
- A pool of money dedicated strictly to fun

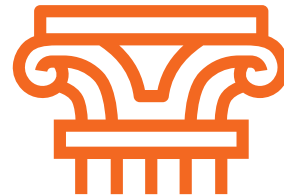
EMERGENCIES



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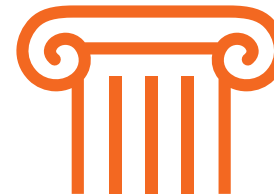
PAYCHECKS



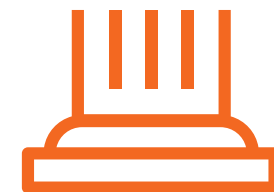
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NEEDS



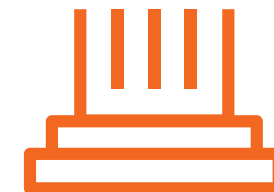
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WANTS



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Investing involves risk including the potential loss of principal.