

# Planning for a Financially Successful Retirement?

## What does retirement mean to you?

This is one of several workshops to provide the attendee with an understanding and application of the essential planning topics necessary to manage your financial life. This information will provide you with a comprehensive financial foundation, along with advanced planning strategies to help you plan for a successful financial future

### The following Retirement Income Planning subjects will be covered:

- ✓ Early Retirement Considerations
- ✓ Delayed Retirement Considerations
- ✓ Working During Retirement
- ✓ How Long Will Retirement Last?
- ✓ Retirement Income Planning
- ✓ How Much Annual Income Will You Need?
- ✓ Accounting for Health-Care Costs
- ✓ Accounting for Inflation
- ✓ Social Security Basics
- ✓ Employer Pension Basics
- ✓ Other Potential Sources of Income

### Instructor: Michael J. Aluotto, CRPC®

Mr. Aluotto is President and Private Wealth Manager of Vertex Wealth Management and has managed clients' wealth for more than 35 years. He is a Chartered Retirement Planning Counselor® and an Investment Advisor Representative, and earned his Bachelor of Science degree from Cornell University.

## Retirement Income Planning



### Reserve your seat:

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