THE Retire Ready **Roadmap**

Every step of the way

INITIAL DISCOVERY VISIT

Discovery Process Addressing Goals and Concerns

- Your Perfect Day
- Your Personal Benchmark
- Baseline Income Assessment
- Baseline Required Minimum Distribution Assessment

FINANCIAL CLARITY VISIT

Reviewing Your Scorecards for Success

- Financial Clarity Scorecard
- Required Minimum Distribution Assessment

PLAN REVIEW & ONBOARDING VISIT

Details of Constructing Your Income Retirement Plan

- Protection Plan
- Income Plan
- Investment Plan
- Real Estate Plan
- Advanced Planning (Tax, Healthcare, & Legacy Planning)

↓

Sign Client Agreement
Open Accounts

CLIENT EXPERIENCE IMPLEMENTATION VISIT

Reiterate Expectations & Structure of Your Plan

- Review Accounts
- Review Initial Statements & Website
- Establish Regular Review Process
- Implement Advanced Planning

(732) 365-3705
65 Mechanic St. Ste. 205 | Red Bank, NJ | 07701

ABRAHAMSEN FINANCIAL GROUP