



Knowledge is Power

Have You Forgot About These Factors In Your Retirement Plan?

You know, many people think that they have thought of everything when it comes to their retirement plan. Unfortunately, that is not the case in most circumstances. Join me this weekend as we bring to your attention the many factors of retirement planning that are most often overlooked in the planning process, which very well could lead to a ruined retirement plan.

The ultimate goal of a successful retirement and estate plan is to make your accumulated assets and incomes as effective and tax efficient as possible, and then to pass your unused assets to your heirs the most effective way. In other words, to protect and grow your assets throughout retirement, and then to protect and preserve your legacy for your family, loved ones and your charitable causes and interests. In order to accomplish this, you will have to address some estate planning factors. When people think of estate planning, it is generally thought of only being needed by the ultra wealthy. Actually though, this isn't the case. Whether people realize it or not, estate planning is a big part of retirement planning. Because of legislation and demographic changes, as well as tax, inheritance and privacy laws, proper estate planning is greatly needed in almost all retirement plans.

That is why you cannot forget about proper estate planning and the many areas and factors that it entails. A few of these areas and factors are common, like proper estate planning documents such as a will or a trust. But most people don't think of the additional areas and factors regarding estate planning. To learn of these many areas and factors, join us this weekend on The Retirement Money Matters Radio Show where we discuss this in great detail. The show airs on Saturday morning at 6 on WIBC (93.1 FM), Sunday morning at 8 on WWKI (100.5 FM) or anytime at www.theretirementmoneymattersshow.com. You can also reach us at 765-452-PLAN.

