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Strategic
Retirement
Planning

Core Retirement Pillars

Pillar One

Guaranteed Lifetime Income

Social Security www.ssa.gov

Age 62 Benefit _____

Forward Rate Agreement & Benefit _____

Age 70 Benefit _____

Spousal/Survivors _____

Pillar Two

Additional Guaranteed Lifetime Income Sources

Second Source _____

Third Source _____

Pillar Three

All Other Investments

Mutual Funds _____

Stocks/Bonds _____

Variable Annuities _____

Fixed Annuities _____

Fee-Based _____

Bank Accounts _____

Estimated Monthly Income at Retirement _____

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