## FocusOn<sup>®</sup>:

## **Financial Management**

S

to a Traditional IRA

**Retirement Plans** 

Save for Retirement

Shortfall

Probate

Leave a Legacy

Long-Term Care

**Trust Strategies** 

Thank You

**Evaluation Form and** 

Federal Estate Taxes

The Cost of Long-Term Care

**Estate Distribution Techniques** 

Additional Estate Documents

**Complimentary Consultation** 

Putting Your Knowledge to Work

Plan

Т

Potential Tax Savings on Contributions

Will the Smiths Have Enough to Retire?

The Smiths' Projected Monthly Income

Benefits of Employer-Sponsored

The Smiths' Sources of Income

The Smiths' Retirement Income

**Developing an Effective Retirement** 

How Much Will You Need to Retire?

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