

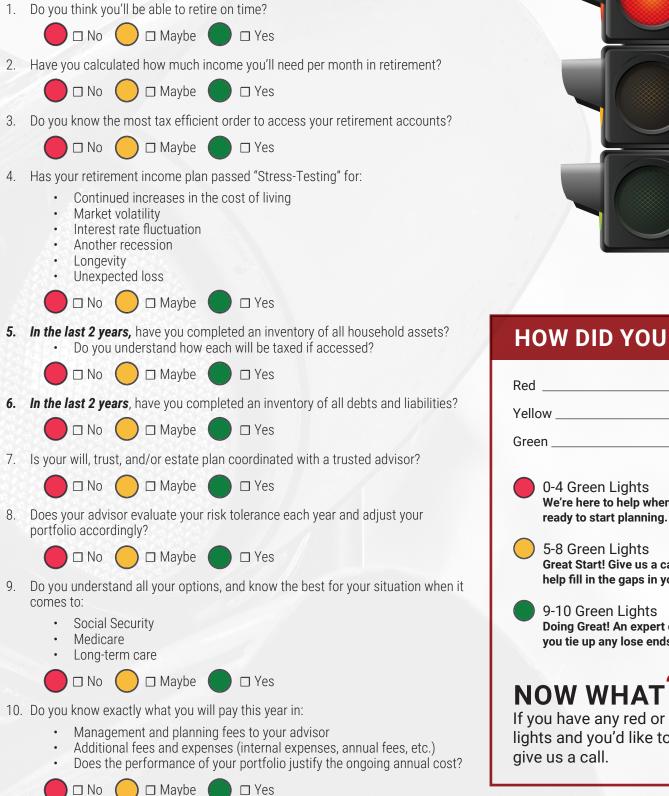
Dear

Is your retirement plan stuck at a red light?

Successfully changing lanes from working life to retirement starts by making sure there's nothing in your blind spot. Knowing that, you'll have the confidence and peace of mind to answer life's most important questions, like "what am I truly passionate about?", "what's on my bucket list?", and "what do I want my legacy to be?" That's why we created the "Retirement Red Light Challenge". It highlights the most critical dimensions of retirement planning, learned over decades of helping people from every walk of life. And just like a red light you don't see until it's too late, failure to account for each "Red Light" in your retirement plan can have real, unintended consequences.

You've worked your whole life to get here. Take a moment now to ensure you're on the right track. Then ask yourself; does it make sense to explore plotting your course with the help of an expert?

RETIREMENT RED LIGHT CHALLENGE





HOW DID YOU DO?

Red
Yellow
Green
0-4 Green Lights We're here to help when you'

- 5-8 Green Lights Great Start! Give us a call to help fill in the gaps in your plan.
- 9-10 Green Lights Doing Great! An expert can help you tie up any lose ends

NOW WHAT

If you have any red or yellow lights and you'd like to discuss,

