



# Retirement Income Planning

## WHAT QUESTIONS CAN A RETIREMENT INCOME PLAN ANSWER?

- When should I start taking Social Security?
- How long will my money last?
- How much money do I need to retire?
- How can I protect against inflation?
- Will my spouse have enough to pay expenses if something were to happen to me?
- How will I pay for medical expenses in retirement?

## WHAT CAN A RETIREMENT INCOME PLAN FROM SUMMIT FINANCIAL SERVICES PROVIDE?

- Retirement Needs Analysis
- Healthcare / Medicare analysis
- Social Security Analysis
- Written Income Plan
- Implementation Schedule
- Client checklist – Action Items
- Consolidated Account Summary through a client access portal

## WHO SHOULD HAVE A RETIREMENT INCOME PLAN?

- Anyone who is 10 – 15 years from retirement or age 50+
- Anyone who has assets that can be converted into income
- Anyone who needs to accumulate additional assets for future income



For more information regarding all the programs and services offered by Summit Financial Services, Inc.

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