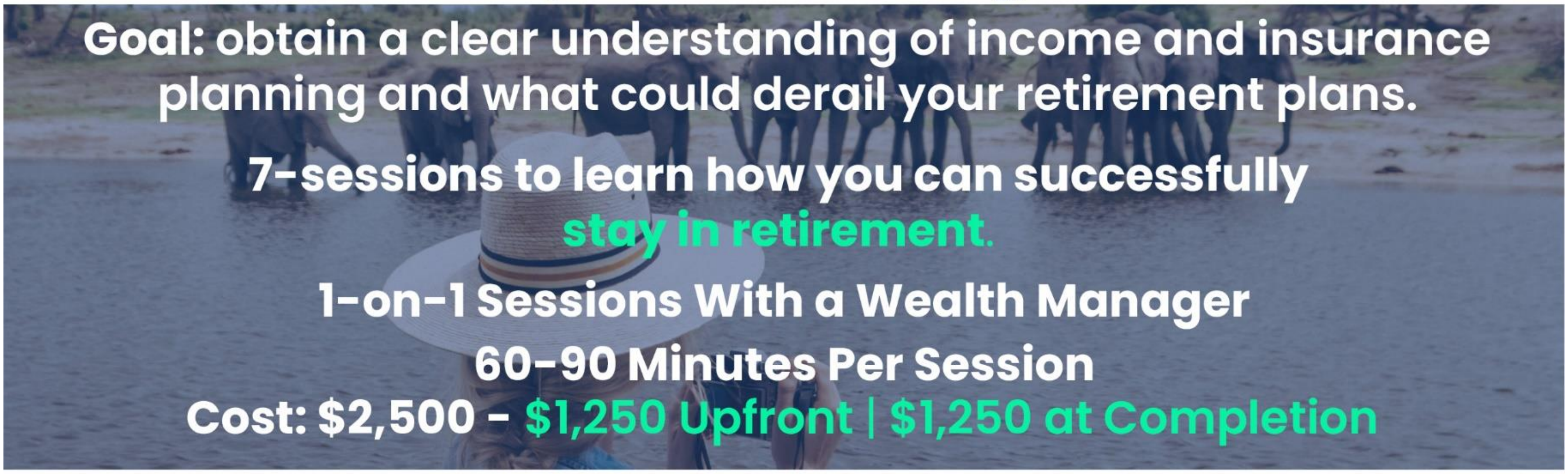
WHITE HAWK
WEALTH MANAGEMENT

Presents

Financial Planning & Coaching for New Retirees

(Within 5 Years of Retiring)



Goal: obtain a clear understanding of income and insurance planning and what could derail your retirement plans.

7-sessions to learn how you can successfully stay in retirement.

1-on-1 Sessions With a Wealth Manager

60-90 Minutes Per Session

Cost: $2,500 - $1,250 Upfront | $1,250 at Completion

SESSIONS

1. FEES - The different ways that financial professionals get paid and different investment charges.

2. INCOME STATEGY - We will take a custom approach to analyzing your cash flow needs in retirement versus using a “Replacement Ratio”.

3. PLAN IT OUT - We will work together to create a financial plan that will layout the path for you to not outlive your money and live out your dreams.

4. SOCIAL SECURITY/MEDICARE - We will work with you to discuss strategies for these benefits and help you decide when to start these, if you haven’t already.

5. PORTFOLIO CONSTRUCTION - We work with you to design a portfolio that will align with your risk and financial goals.

6. INSURANCE - Take a look at the use of insurance for different protection needs that you might have, including long-term care.

7. GIFTING - Education on the different ways that we can give assets away and leave a bequest at our passing.

www.WhiteHawkWealth.com