

# FocusOn®:

## Retirement

### I M A G E L I S T

<b>0010</b> Welcome	<b>0250</b> Roth IRA
<b>0020</b> Workshop Objectives	<b>0260</b> Annuities
<b>0030</b> Our Commitment	<b>0270</b> Types of Annuities
<b>0040</b> Evaluation Form	<b>0280</b> Taxable Investments
<b>0050</b> About Your Workbook	<b>Bonus slide</b>
<b>0060</b> A Tale of Two Portfolios	<b>0290</b> Sources of Retirement Income
<b>0070</b> Robert's Approach	<b>0300</b> Three Keys to Funding a Comfortable Retirement: Invest Wisely
<b>0080</b> Karen's Approach	<b>0310</b> Invest Wisely
<b>0090</b> Lesson Learned	<b>0320</b> Diversification
<b>0100</b> Three Keys to Funding a Comfortable Retirement: Determine Your Needs	<b>0330</b> Diversification
<b>0110</b> Determine Your Needs	<b>Bonus slide</b>
<b>Bonus calculator</b>	<b>0340</b> Asset Allocation
<b>0120</b> How Much Money Will You Need?	<b>0350</b> Personalizing Your Asset Allocation Model
<b>0130</b> Retirement Age	<b>0360</b> Investment Objectives
<b>0140</b> Length of Retirement	<b>0370</b> Time Frame
<b>Bonus slide</b>	<b>0380</b> Historical Investment Performance
<b>0150</b> Health-Care Needs	<b>0390</b> Risk Tolerance
<b>0160</b> Inflation	<b>Bonus workbook exercise</b>
<b>Bonus calculator</b>	<b>0400</b> Sample Asset Allocation Model: Conservative Investor
<b>0170</b> Lifestyle	<b>Bonus slide</b>
<b>Bonus workbook exercise</b>	<b>0410</b> Sample Asset Allocation Model: Aggressive Investor
<b>0180</b> How Will You Get There?	<b>Bonus slide</b>
<b>0190</b> Social Security	<b>0420</b> Dollar-Cost Averaging
<b>Bonus slide</b>	<b>0430</b> Dollar-Cost Averaging
<b>0200</b> Continued Employment Earnings	<b>0440</b> Keep Expectations in Check
<b>0210</b> Personal Savings and Investments	<b>Bonus calculator</b>
<b>0220</b> Tax Deferral Can Help Save Money	<b>0450</b> Three Keys to Funding a Comfortable Retirement: Protect Your Nest Egg
<b>0230</b> Employer-Sponsored Retirement Plans	<b>0460</b> Two Different Scenarios
<b>Bonus slide</b>	
<b>0240</b> Individual Retirement Accounts	
<b>Bonus slide</b>	

# FocusOn®:

## Retirement

### I M A G E L I S T

- 0470** Protect Your Nest Egg
- 0480** Start Saving Now
- 0490** Rebalance Regularly
- 0500** Assess Whether You're on Track
- 0510** Prepare for the Unexpected
- 0520** Life Insurance  
**Bonus slide**
- 0530** Long-Term Care Strategy
- 0540** The Cost of Long-Term Care  
**Bonus calculator**
- 0550** Three Keys to Funding a Comfortable Retirement
- 0560** Where Do You Go from Here?
- 0570** Where Do You Go from Here?
- 0580** Evaluation Form
- 0590** What to Bring
- 0600** Thank You

### Bonus features

- For Slide 0110:*  
0610 How Much Would Someone Need? (*calculator*)
- For Slide 0140:*  
0620 Centenarians Grow in Number
- For Slide 0160:*  
0630 Loss of Purchasing Power (*calculator*)
- For Slide 0170:*  
0640 How Much Will You Need to Retire?  
(*workbook exercise*)
- For Slide 0190:*  
0650 Pensions
- For Slide 0230:*  
0660 Manage Your 401(k)
- For Slide 0240:*  
0670 Traditional IRA
- For Slide 0280:*  
0680 Why Do People Invest in Mutual Funds?
- For Slide 0330:*  
0690 Diversification
- For Slide 0390:*  
0700 How Much Risk Can You Stand?  
(*workbook exercise*)
- For Slide 0400:*  
0710 Twenty-Year Performance Record:  
Conservative Portfolio
- For Slide 0410:*  
0720 Twenty-Year Performance Record  
Aggressive Portfolio
- For Slide 0440:*  
0730 Are Your Expectations Realistic? (*calculator*)
- For Slide 0520:*  
0740 How Whole Life Insurance Works
- For Slide 0540:*  
0750 Calculating the Cost of Long-Term Care  
(*calculator*)