California RETIREMENT Advisors

Personal Wealth Management For Retirement

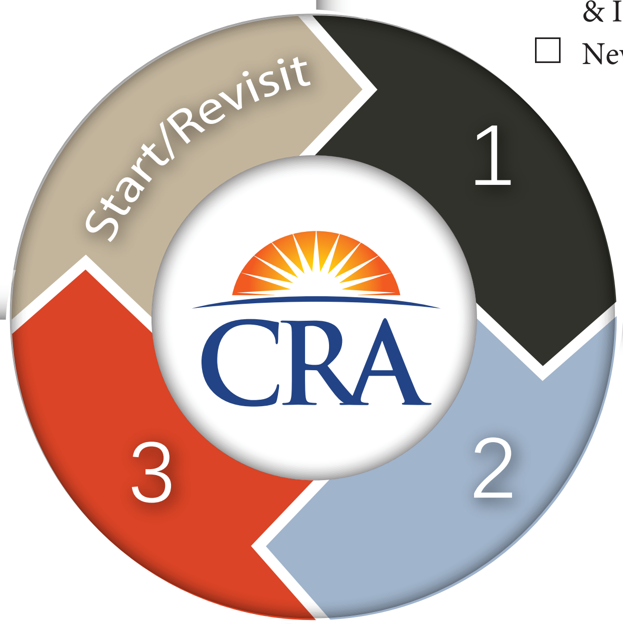
ADVISORY PROCESS

VALUES, GOALS & OBJECTIVES

- ☐ Introductory Meeting
- ☐ General Planning Overview
- ☐ Defining the Client & Planner Relationship
- ☐ Planning Next Steps

RETIREMENT PLANNING

- ☐ Data Collection & Confirmation
- ☐ Inventory to Organize & Simplify
- ☐ Income Planning, Analysis & Recommendation
- ☐ Investment Strategy Discussion & Implementation
- ☐ New Strategy Orientation



- ☐ Investment Review & Tax Organization
- ☐ Tax Reduction & Cash Flow Review
- ☐ Estate Planning, Beneficiary & Insurance Review
- ☐ Retirement Continuing Education

PROGRESS REVIEWS

- ☐ Risk Mgmt with Insurance Agent(s)
- ☐ Tax Planning with CPA
- ☐ Estate & Legacy Planning with Attorney
- ☐ Optional Family Meeting

WEALTH MANAGEMENT

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