



# Financial Planning & Coaching for Pre-Retirees (Within 5 Years of Retirement)

Goal: obtain a clear understanding of retirement planning and what might impact your financial goals.

7-sessions to learn how you can successfully  
**prepare for 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 STRATEGY** - We will take a custom approach to determining 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 pursue your retirement dreams.
- 4. SOCIAL SECURITY/MEDICARE** - We will work with you to discuss strategies for these benefits and help you learn to navigate the complexities.
- 5. INVESTMENTS** - Education on the different types of investments and how to navigate the "ocean" of options available.
- 6. PORTFOLIO CONSTRUCTION** - We work with you to design a portfolio that will align with your risk and financial goals.
- 7. INSURANCE** - Take a look at the use of insurance for different protection needs that you might have.

[www.WhiteHawkWealth.com](http://www.WhiteHawkWealth.com)

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