

# RISK STRATEGIES

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THE RISK PROCESS™ CAN SHOWCASE many unique scenarios and how they impact a client's customized Blueprint. Below is a sample list available for illustration:

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## RETIREMENT INCOME EVENTS

- Deferred Compensation
  - Stock Options (Incentive & Non-Qualified)
  - Net Unrealized Appreciation
  - Pension Election Analysis
  - Social Security Optimization
  - Roth Conversion
  - Bucketing Investment Strategy
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## WHAT IF EVENTS

- Sale of Business
  - Downsizing Homes
  - Large Future Purchases
  - Assumed Inheritance
  - Bucketed Income Planning “Go Go, Slow Go, No Go” (Staged Retirement Planning)
  - Survivorship Planning
  - Effects of a Long Term Care Event
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## ESTATE PLANNING

- Estate Tax Liability Analysis (which can include assets such as real estate, business interest, etc.)
    - Annual Gifting Strategies
    - Charitable Remainder Trust
    - Wealth Replacement
    - Private Loan Regime Split Dollar / ILIT
    - 529 Planning
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