



THE FUN RETIREMENT PROGRAM

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THE FUN RETIREMENT PROGRAM

We are financial planners. We created *The Fun Retirement Program*™. Acting as your guide, we help you build a financial foundation to have fun in your retirement.

"I have two choices for you: basic and advanced. For the basic service, I can provide you with standard financial planning and products. Of course, you can get this basic service from hundreds of other advisors. However, the advanced program I created takes everything to a higher level and is only available from me.

(It is important to note that you don't need to give up your existing advisor to join the advanced program.)

I realize however that the advanced program is not for everyone. It is for financially successful people who respect the advice of experts, and are open to new ideas. They also think ahead to the future, and are willing to take the time to plan. If you are someone like that you might be interested in the advanced program. Otherwise, we can focus on the basic products and services.

We created this program because many people get in trouble when they don't create a plan for having fun in their retirement. When they don't do this, they often fail to have enough money, they feel stressed and worried, and they don't have a lot of fun.

However, when you create a plan to have fun in your retirement, you will more likely have enough money, you will be more confident and relaxed, and you will have more fun.

**Many
people get
in trouble
when they
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retirement**

That's why we recommend you do three things:

Honestly assess how you feel emotionally about your retirement;
Create a written vision of what it will be like when you are having fun in your retirement;
Create and implement a plan to have fun in your retirement.

If you would like to work on these steps with me, I offer a free 90-minute starter session. During the session, we will do three things: 1. Honestly assess how you feel emotionally about your retirement. 2. Create a written vision of what it will be like when you are having fun in your retirement. And then we will determine together whether you should join The Fun Retirement Program.

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The Fun Retirement Scorecard Exercise

To help you clearly understand your current situation, try *The Fun Retirement Scorecard*. Rate your reactions to each pair of phrases. Decide where you lie on the scale from 1 to 10. Add up your total from each column.

We do not have a clear vision of our retirement	1	2	3	4	5	6	7	8	9	10	We have a clear, well-defined vision of our retirement
We do not have a vision to have fun in our retirement	1	2	3	4	5	6	7	8	9	10	We have a vision to have fun in our retirement
We do not have a plan to have fun in our retirement	1	2	3	4	5	6	7	8	9	10	We have a plan to have fun in our retirement
We are worried that we will not have enough money in retirement	1	2	3	4	5	6	7	8	9	10	We are confident that we will have enough money in retirement
We are stressed and concerned about our retirement	1	2	3	4	5	6	7	8	9	10	We are confident and relaxed about our retirement
We have not reviewed all of the resources we need to enjoy our retirement	1	2	3	4	5	6	7	8	9	10	We have reviewed all of the resources we need to enjoy our retirement
We have focused solely on money, and have not figured out what we are going to do in retirement	1	2	3	4	5	6	7	8	9	10	We have figured out we are going to do in retirement
We are not confident that will implement our plans for retirement	1	2	3	4	5	6	7	8	9	10	We have a system in place to ensure that we implement our plan for retirement
We do not feel we have the support we need to achieve our retirement plan	1	2	3	4	5	6	7	8	9	10	We have the support we need to achieve our retirement plan
We are dreading our retirement	1	2	3	4	5	6	7	8	9	10	We can't wait to enjoy our retirement

ADD COLUMN TOTALS. YOUR SCORE IS _____.

For each row ask yourself:

Question 1: Why did you give yourself that score?

Question 2: What do you think you need to do to improve your score?

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THE VISION QUESTION

Describe in detail what you would be doing if you were having a lot of fun during your retirement.

Name of Vision

The _____

Yes ☐ No ☐ Are you committed to this vision?

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Name of Vision _____

The Three Projects

To achieve my Vision, I need to work on these three projects:

1.

2.

3.

My Three Actions

To get started, I must immediately take these three actions:

1.

2.

3.