

WBC Wealth Building Triple Play

(For Pre-Retirees)

Introductory Meeting:

- Your Perspective (Optional)
- Pre-Retiree Introduction #2
- Rough Populate Pre-Retiree Cornerstones Blueprint™
- Set Next Meeting for 1 week out

Wealth Building Meeting (Conceptual):

- Pre-Retiree Wealth Building #2 Presentation
- Life Applications
- Set Next Meeting for 2-3 weeks out

Wealth Building Meeting (Personal Numbers):

- Review Wealth Building #2 Presentation (highlighting default path of withdrawal rate simulations, Covered Asset, and Volatility Buffer)
- Run Inflation Adjusted Retirement Income Needed from Assets
- Review the multiple Cornerstones Calculator™ scenarios you've run with them that show the results of varying degrees of balancing and possibly additional savings amounts as necessary.
- Decide what to implement.