



Retirement Maps

Don't wonder if a client's risk preference will allow them to achieve their goals—calculate their probability and build a map to success. Illustrate the bigger picture and even uncover outside assets.

- ✓ Select
- ✓ Elite
- ✓ Enterprise

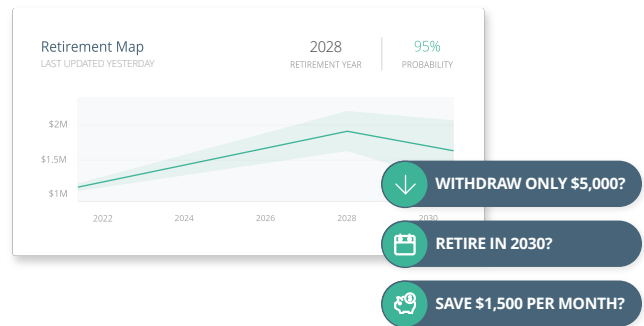
Nice to meet you, goals.

An investor's risk tolerance is only one ingredient. When you also assess risk capacity, it becomes easy to illustrate how much risk they need to reach their goals.

Have a client who wants to *take on zero risk, retire early, and live like a king*? You know they can't make it from Los Angeles to New York in six hours if they're afraid to fly. Retirement Maps is a great way to illustrate your expertise.

Retirement Maps serves as a great precursor to a comprehensive financial plan. When a client understands what they need, you can tailor a portfolio and plan to match.

Want to add an event to the map? Timeline lets you see how changing a client's Risk Number, income, or expenses over time will affect their overall risk capacity.



INVESTMENT AMOUNT	MONTHLY SAVINGS
\$ 225,000	\$ 1,250
RETIREMENT YEAR	MONTHLY WITHDRAWAL
2052	\$6,000

Discover held-away assets.

Retirement Maps is used to paint a picture of risk capacity to see if an investor has the right amount of risk to reach their goals. But it also serves as a great launching point to talk about the big-picture overall. Clients love seeing their map bounce into the green.

You'd be surprised how often a client's desire to bolster their Retirement Map jogs their memory about an old 401K.

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