



Retirement Rules

OF THE ROAD

PLAN YOUR TRIP

- Know your visions, goals and dreams
- Commit to living a healthy lifestyle
- Have a lifetime plan to emotionally endure the ups and downs of life

BUCKLE UP

- Purchase big ticket household and family items before retiring
- Be and stay debt free
- Have and keep a monthly spending plan and remove unnecessary expenses
- Have and keep an Emergency Fund equal to two years of monthly expenses
- Implement a well thought out, responsible and consistent income plan

ENJOY THE RIDE

- Stay growth oriented with retirement and investment accounts
- Avoid trying to time the financial markets
- Reduce distributions from retirement and investment accounts during periods of economic stress
- Think with a lifetime time horizon and seek professional guidance

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Retirement accounts may be subject to Required Minimum Distribution laws.