

# Peace of Mind Retirement Seminar Highlights



EAST VALLEY  
WEALTH & RETIREMENT

Presented by East Valley Wealth & Retirement

## WHAT WE COVERED

### 1. MAXIMIZING YOUR RETIREMENT PORTFOLIO

- Market-linked income options for protection and growth
- Structured notes and dividend strategies
- Flexible income planning using bucket and time segmentation strategies
- Social Security timing optimization

### 2. SMART INVESTMENT MANAGEMENT

- Reduced-fee, transparent investing
- Full independence—no proprietary constraints
- Access to alternatives: REITs, Bitcoin, structured notes

### 3. TAX PLANNING STRATEGIES

- Multi-year tax planning to avoid future “tax bombs”
- Strategic Roth conversions
- RMD management

### 4. HEALTHCARE & LONG-TERM CARE

- Life insurance with living benefits
- Indexed Universal Life (IUL) strategies
- Medicare and pre-65 insurance support - retire before 65 without being burdened by the cost of health insurance
- Health expense projections tailored to your situation

### 5. ESTATE & LEGACY PLANNING

- Wills, trusts, powers of attorney, healthcare directives
- Tax-efficient wealth transfer
- Lifetime amendments—no update fees
- Eliminate probate costs and ensure your legacy

## REAL-LIFE CASE STUDY

We explored common pitfalls like withdrawing from an IRA too early instead of leveraging Social Security strategies—showing how small timing shifts can have big retirement impacts.

## East Valley Wealth & Retirement

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Investment Advisory Services are offered through East Valley Wealth LLC, a registered investment adviser. All Insurance based services including Fixed Indexed Annuities are offered through East Valley Retirement. East Valley Wealth LLC and East Valley Retirement are separate and affiliated entities.

## OUR PROCESS: FROM DISCOVERY TO DELIVERY

- 1. Initial Consultation:** Get to know your goals and concerns
- 2. Strategy Review:** Identify blind spots and tailor your plan
- 3. Custom Roadmap:** A personalized retirement strategy with Peace of Mind at its core

## WHAT PEOPLE ARE SAYING

*“This was the first time I really understood my retirement plan.”*

*“Eye-opening session—especially the tax section!”*

*“Can’t believe how much we covered in just one evening.”*

## LET’S KEEP THE CONVERSATION GOING

If you haven’t scheduled your **complimentary consultation**, now’s the time.

- ✓ Get a personalized **Retirement Strategy Analysis**
- ✓ Review your current retirement plan including your investments, annuities, and taxes
- ✓ Build a flexible, holistic plan to enjoy your retirement with Peace of Mind

Schedule your appointment  
*(15 minute phone call)*

or Call or text us at (480) 525-1839

Email: [theteam@eastvalleyretirement.com](mailto:theteam@eastvalleyretirement.com)



## WHAT TO BRING TO YOUR FIRST APPOINTMENT

- Retirement account statements (IRA, 401k, brokerage)
- Social Security and annuity statements
- Last year’s tax return
- Questions, goals, and dreams

## *From Our Family to Yours*

We appreciate the opportunity to guide you through this important journey.

Led by Undrea Smith, RICP® and a team that puts your Peace of Mind first.