Meeting 1: Taking Control

Introduction to Tucker Bria and the Strategic Retirement Planning Program:
What to expect and an overview of our retirement planning process.

Personalized Approach:
We will identify the planning topics that are important to you. This is not an off-the shelf program. We discover your unique needs and ensure we understand your personal, professional and retirement objectives.

Define Your Retirement Dreams:
We identify your retirement aspirations and goals, both short-term and long-term, providing clarity and direction for your retirement journey.

Retirement Spending Made Easy:
Decide whether a budgeting app or an Excel spreadsheet works best for you to manage your finances. You then implement your spending strategy from your retirement and non-retirement accounts in the most tax-efficient way for you and your beneficiaries.

Plot your Roadmap for Success:
Receive a comprehensive checklist with topics to guide our retirement planning discussions, ensuring we address the areas that matter most to you.

Next Steps:
Set a convenient date and time for our next meeting, where we'll dive deeper into understanding your retirement vision.

Meeting 2: A Deep Dive

POSSIBLE TOPICS

- When to start Social Security
- Can I retire now
- Should I move to a different house or state
- How much investment risk is appropriate
- How to protect my spouse if I die first
- Should I set up a revocable trust

- **Fact-Finding:** Conduct a detailed fact-finding process to gather additional information about your financial situation, assets, liabilities, income, expenses, and other relevant inputs
- **Education on Your Chosen Topics:** Provide in-depth information and education on the specific retirement planning topics chosen by you. This can include investment strategies, real estate downsizing, tax planning, debt management, or any other relevant area of interest
- **Checklist Review:** Go over the checklist provided in Meeting One and prioritize the topics or areas of retirement planning that you wish to focus on
- **Presentation Process:** Discuss the upcoming presentation of your retirement plan. Explain the format, tools, and methodologies that will be used to present your retirement plan clearly

Meeting 3: Embarking On A Strategy For Success

Presentation of Your Retirement Roadmap:
Engage in an interactive session where we present the findings of your customized financial plan developed using innovative financial planning software.

Clarity and Understanding:
Confirm that the presented plan makes sense to you, providing clarity and a comprehensive strategy for your retirement path.

Define Our Future Partnership:
Discuss ways for on-going or intermittent collaboration and engagement, ensuring support and guidance **OF YOUR CHOOSING** for your retirement journey.

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ABOUT US

A TRUSTED PARTNER IN WEALTH MANAGEMENT

The advisors and planners at Tucker Bria have **over 45 years of wealth advisory experience** successfully partnering with clients just like you in the pursuit of their retirement dreams.

The principals of the firm, Jim Tucker, CFP® & Pat Bria have business experience in addition to wealth management. Prior to entering the wealth management field, Jim was part of two start-ups that went public, and Pat was involved with real estate and entrepreneurial firms.

Your Financial Life in Focus®

Strategic Retirement Planning

Your Financial Life in Focus®

JUST YOU.
NOT A SEMINAR OR CLASS!

Tucker Bria Wealth Strategies
3100 Tower Blvd, Suite 117
Durham, NC 27707

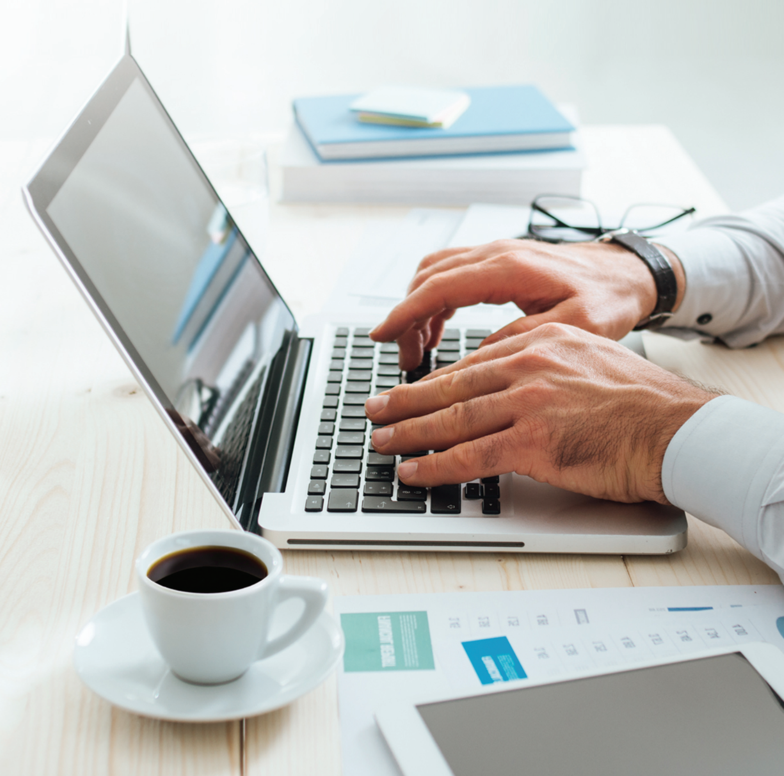
TUCKER | BRIA
WEALTH STRATEGIES

Strategic Retirement Planning

Your Financial Life in Focus®

Ideal for 50 to 70 year-olds with savings in excess of $1 million

- The Tucker Bria Strategic Retirement Planning Program is designed for individuals and families nearing retirement who are ready to bring their retirement vision into focus.
- Through a series of three personalized meetings with our experienced financial professionals, Strategic Retirement Planning aims to empower you with the knowledge, tools, and strategies needed to pursue your retirement dreams.
- From understanding your unique financial situation to creating a tailored plan, we will guide you every step of the way.



Strategic Retirement Planning

Your Financial Life in Focus®

TUCKER | BRIA
WEALTH STRATEGIES

INTRODUCING AN INDIVIDUALIZED PLANNING PROCESS SO YOU CAN **GAIN CONTROL OVER YOUR RETIREMENT LIFE.**

DISCOVER THE TRANSFORMATIVE POWER OF OUR STRATEGIC RETIREMENT PLANNING PROGRAM

SCAN ME

CALL OR SCAN NOW TO PLAN YOUR RETIREMENT JOURNEY | (919) 381-5780

GOAL ORIENTED FINANCIAL PLANNING | JUST YOU. NOT A SEMINAR OR CLASS!

Why Strategic Retirement Planning is Important

- Gain clarity about your retirement goals and create a roadmap to achieve them.
- Optimize your resources and make informed decisions that aim to maximize your retirement income in a tax-efficient manner.
- Mitigate risks and protect yourself and your loved ones from financial setbacks.
- Develop strategies for retirement spending and keeping pace with inflation.
- Make confident financial choices, backed by advice and actionable insight.
- Adapt to life's changes and develop the financial resilience to navigate health challenges by transferring financial risk.
- Leave a lasting legacy for your family and future generations.

HOW OUR PROGRAM CAN TRANSFORM YOUR FUTURE

- **Achieve Clarity and Direction**
- **Maximize Wealth Potential**
- **Mitigate Risks and Protect Assets**
- **Build a Strong Financial Legacy**
- **Plan for Retirement with Confidence**