



Roadmap to Retirement

<p>Insight We listen. We add clarity. Develop a rapport.</p>	<p>Insight Visualize your financial position like never before with powerful software.</p>	<p>Insight Income is now your goal with a new strategy.</p>	<p>Insight Policies can be designed to multitask.</p>	<p>Insight 92% of Americans do <u>not</u> maximize their benefit.</p>	<p>Insight <u>70%</u> of children will not live in their parent's house after the parent dies.</p>	<p>Insight <u>70%</u> Chance of having a long term care need age 65+.</p>	<p>Insight <u>51%</u> of Americans choose Medicare Advantage. Is it for you?</p>	<p>Insight <u>54%</u> of women (19% men) age 75+ are widows.</p>	<p>Insight <u>70%</u> of affluent families lose wealth by second generation.</p>
<p>Genesis Value Questions you may not ask. New options to consider. Strategies to implement.</p>	<p>Genesis Value Powerful financial planning software showing all of your accounts working as one coherent plan.</p>	<p>Genesis Value Advisors may add <u>1.5%</u> to 4% per year in investment added value alone.</p>	<p>Genesis Value Managing risk allows you to pursue your goals with more confidence and less worry.</p>	<p>Genesis Value We weave a benefit claiming strategy into your retirement plan.</p>	<p>Genesis Value Discuss if you could improve your probability of retirement success.</p>	<p>Genesis Value Designing strategies so you are not a time & financial burden on your family.</p>	<p>Genesis Value Helping you decide which plan is a fit for you.</p>	<p>Genesis Value A financial advisor can help you manage your financial affairs if you lose your "Spouse CFO".</p>	<p>Genesis Value Tax-efficient wealth transfer to your beneficiaries.</p>

We'll show you a better retirement in 50 minutes. Will you invest 50 minutes toward the next 30 years?

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You may encounter many financial decisions for/during retirement. Different people may address the same topic at a different ages. Some financial decisions are optional, some required. Each decision puts your money on a mission. Will you manage all of these decisions well?

GenesisWealthAdv.com

Scan & Schedule

Your Most Valuable 50
Retirement Minutes



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*Are you
“retirement ready”?*

*Open our
Retirement Roadmap
to see the
financial decisions
ahead.*

