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.

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

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.

East Valley Wealth & Retirement

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