Her Retirement®

Welcome to the Savings to Security Masterclass

Estate Planning & Medicare

Get comfy and grab yourself a cup of tea, coffee, water or wine.
Say hi and let everyone know your childhood hero.

Housekeeping…

- Get comfy: turn off and tune out distractions
- 6:30-8:30pm
- Replay links and materials will be available at:
  - Masterclass Homework – Her Retirement
- Audio and video controls
- Taking notes: pen and paper
- Post questions in the Q&A or chat
- Trivia questions for 3 prizes at the end and some great offers.

Hello!

For those of you who are attending a Her Retirement webinar for the first time, my name is Lynn Toomey and I'm the founder of Her Retirement and the creator of this Savings to Security Masterclass.

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Tonight is session 5 in a 5 part retirement masterclass I've been hosting over the last 5 weeks.

If you haven't participated in the last 4 classes live or watched the replays, I'll email you a link to all the replays.

Tonight we're teaching you about...

- Estate Planning with David Feakes, The Parents Estate Planning Law Firm
- Medicare Overview with Cheryl Boyles with Your Retirement Advisor
- Next Steps with Lynn Toomey, Her Retirement

Build Your Plan with these Steps

- ❑ Use the Retirement Readiness Platform to Take an Inventory and Understand Possible Gaps
- ❑ Get serious about physical and mental health
- ❑ Pre-Retirement Optimization
- ❑ Consider your goals/lifestyle desires
- ❑ Understand & address risks
- ❑ Create your Income Distribution Plan
  - ❑ Identify sources of income & expenses
  - ❑ Address any gap
  - ❑ Refine your retirement portfolio to balance growth & guarantees
  - ❑ Understand fees and portfolio costs
  - ❑ Choose tax efficient withdrawals
- ❑ Create your Income Protection Plan
- ❑ Get Reliable Guidance

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Today's Affirmation...

This Week's Mom Story...This Too Shall Pass

A very proud meeme
Mother
Grandmother &
Great Grandmother of twins!

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And she’s in remission as of this week!

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Let’s turn this over to David

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Thank you to David & Cheryl for sharing some valuable and actionable education with us.

True/False?

I learned a lot from this webinar.

Implement these Strategies for a Better Retirement Outcome

- **Strategy 1: Reduce Portfolio Risk & Volatility -** Proper Portfolio Allocation to reduce risk and increase return potential
- **Strategy 2: Add Alpha-Portfolio Management –** Benchmark your current portfolio and Potentially add positive Alpha-Management to increase returns above a passive only strategy
- **Strategy 3: Properly Time Social Security Income -** Increase your guaranteed income through proper Social Security Timing
- **Strategy 4: Use Home Equity Prudently -** Add a Safety Net or an additional Tax-Free income source utilizing your Home Equity
- **Strategy 5: Create Tax Efficiency –** Create a tax-efficient income and protect your retirement from potential increasing taxes
- **Strategy 6: Protect Your Retirement** – with insurance & estate planning

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Next Steps in your retirement planning journey…

(Besides watching all the sessions of the masterclass)

Don’t Do Anything & Continue to Wonder & Worry

Try to Go it Alone

Work with Your Existing Advisor

Or…

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Go From Savings to Security with My "Get Her Done" Approach

(regardless of your starting point)

Her Readiness Coach

Our Approach is guided by a dedicated RetireMentor coach who gets you organized and focused, asks you the tough questions, helps you find the answers, keeps you on track and makes sure you actually create and implement a plan vs. just thinking about it.

Start Here

Her Readiness Platform

Our Approach is powered by patent-pending software that identifies and analyzes your financial knowledge, financial and lifestyle goals, needs, gaps and opportunities. You're then presented with personalized e-learning modules, comprehensive guidance and strategies.

Start Here

Her Readiness Team

Our approach connects you to a vetted team of financial, legal and lifestyle subject matter experts who help you create and implement your plan. We also prepare you to have more informed conversations with your team and to make more informed decisions.

Start Here

Her Readiness Community

Our Approach gives you access to a community of like-minded women where we share valuable content, inspiring stories, ideas, humor, and encouragement. We connect the community through our private Facebook group, Zoom chats and our Know More. Have More mission.

Start Here

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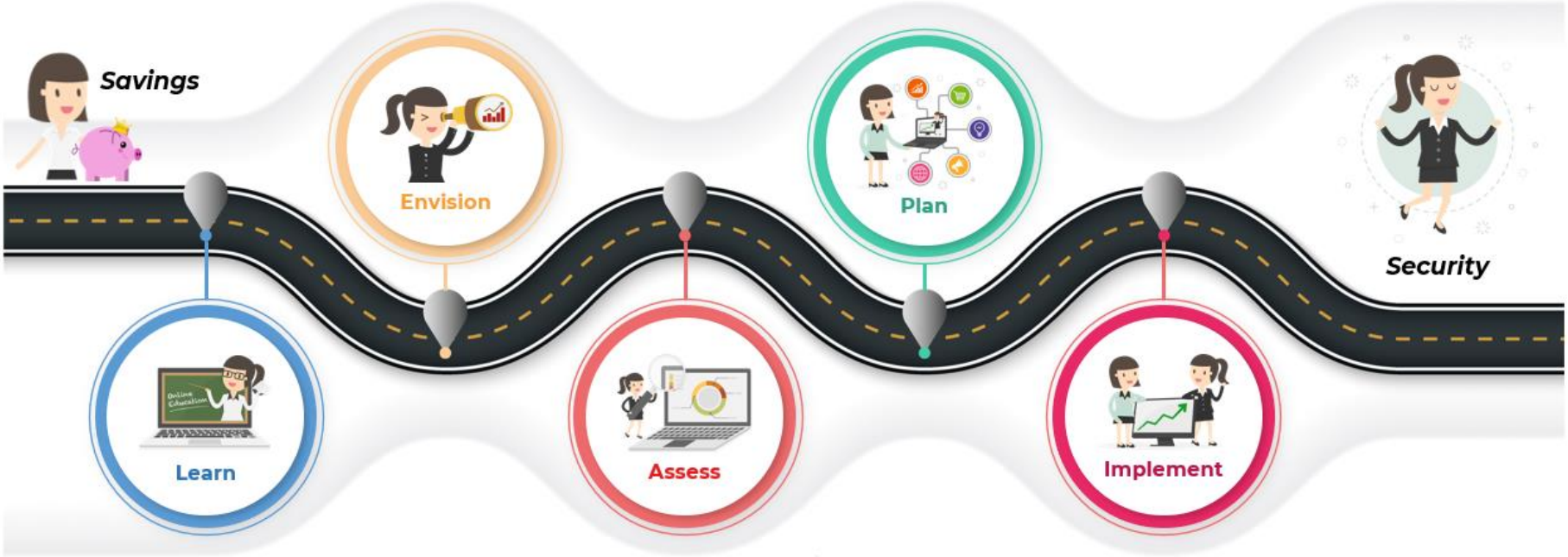
As your coach, I'll Help You Get Retirement Ready



My process maps out easy to follow, educational and empowering steps to create and implement a retirement plan you not only understand, but have 100% confidence in.

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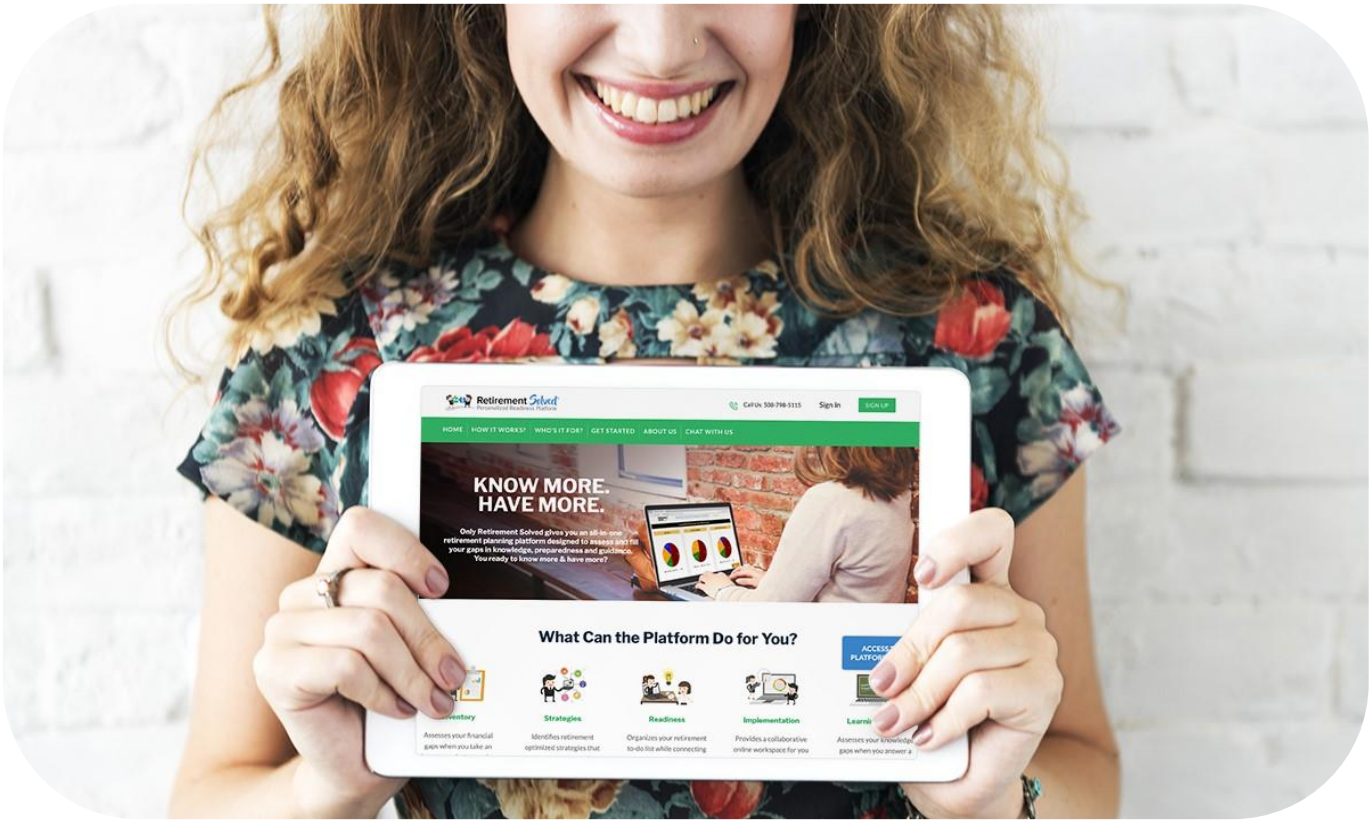

You, Me & Some of the Stuff You Have to Figure Out

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As your coach, I'll guide you through these steps

1. Schedule Get Her Done Virtual Coffee Chat w/ Lynn

2. Start the Approach… Organize & Prioritize (Join membership)

3. Identify Your Gaps, Risks & Opportunities

4. Identify Your Needs & SME Options

www.getherdonechat.com

5. Assessment request & review with SME

6. Get Started on a Flat Fee-Based Financial Plan

7. Implement Plan with Your Retirement Advisor

8. Continue with Membership & Coaching as needed

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As your coach, I'll help you with longevity planning too.

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Your Investment in Your Retirement

Pricing – Her Retirement

HER RETIREMENT

Financial Wellness Coaching & *Membership Program*

"If you want to be strong, learn to fight alone. If you want to be successful, learn to fight with a team."

Get Her Done **Basic**	Get Her Done **Plus**	Get Her Done **Member**	Get Her Done **Coach**
free trial & then $8/mon	**$14**/mon	**$97**/mon	**$197**/mon
Access to Software (Learn & Assess) + 30 Min. Chat	Basic + All LEAPI Modules + 30 Min. Chat	Plus + Membership + One Hour Coaching	Member + Monthly Coaching
	Get Educated, Have a Complete View Into Your Finances, Gaps, Risks & Opportunities for Wealthbuilding, track tasks, understand retirement optimized strategies and implementation best	Get Ready for Retirement: Full access to all software modules. Access to all membership benefits and readiness process. Plus coaching kick off.	Get Ready for Retirement: Full access to all software modules. Access to all membership benefits and readiness process. Plus monthly coaching calls. • Everything in Member + monthly coaching calls

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The result of my coaching is the creation and implementation of a plan for retirement you not only understand, but have 100% confidence in.

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Note to Self...

"Work with a coach, advisor and/or team that incorporates all the intricate retirement strategies to dramatically increase the probability of a retiree's success."

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Remember Jane…she's sitting pretty (literally) because she followed the process and worked with Her Retirement to create and implement a plan she not only understands, but has 100% confidence in.

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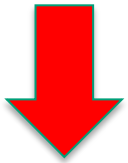
A Better Retirement Outcome (and living the retirement you've imagined) starts here...



www.GetHerDoneChat.com

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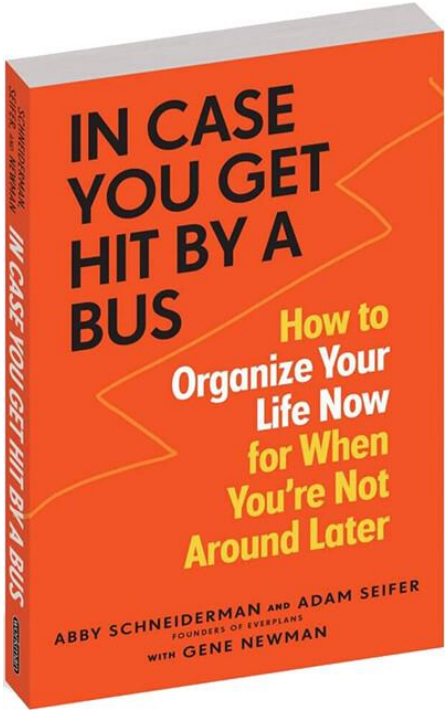
Who's going to win?



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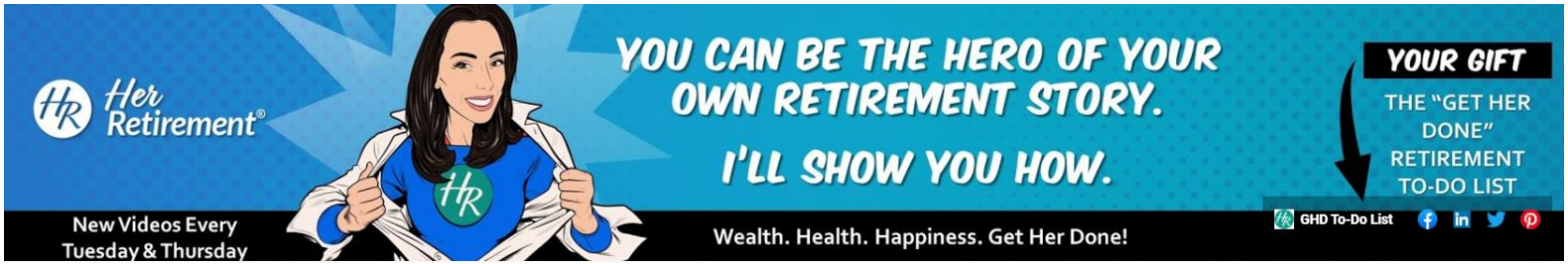
Get more support, information and inspiration

from my podcast, Youtube channel and private FB group



Please also share with friends & family

- Her Retirement Website
- Retirement Solved Readiness Platform
- Lynn's Blog & Podcast
- Lynn's Private Her Retirement Facebook group
- Lynn's Youtube Channel
- Coming Soon: Lynn's book

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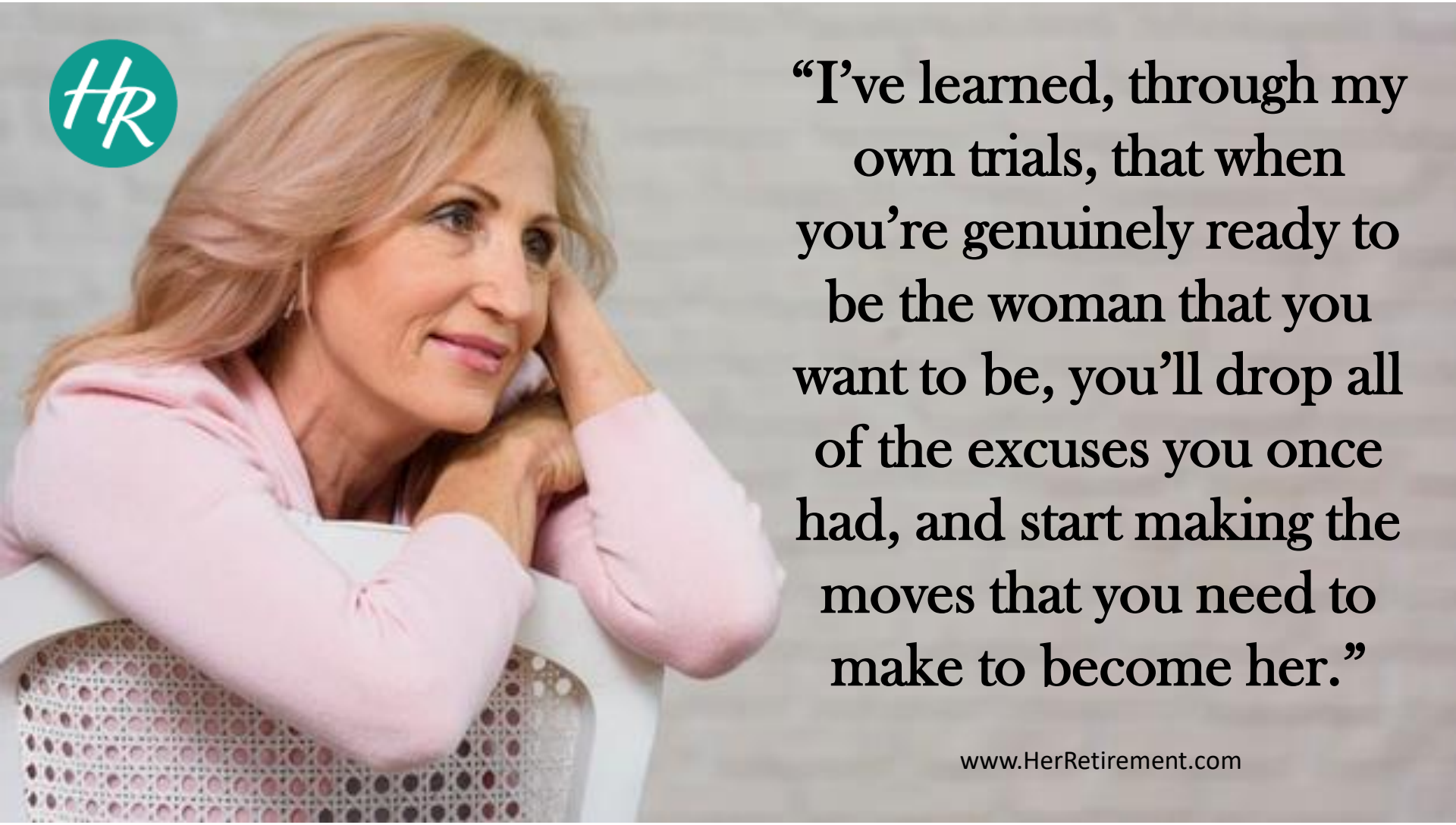

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Thank you for coming tonight.

SmartHER. StrongHER. More Secure.

Let's Get Her Done. See you next week.