



3 Key Professionals to Have in Your Corner



3 Key Pros to Have in Your Corner

Welcome

- » About today's topic
- » Our audience today
- » Q&A – the ProFeds Support Team standing by
- » Handouts – available for download
- » Recorded – how to get the replay
- » Stay until the end!

3 Key Pros to Have in Your Corner

Your ProFeds Presenter



Chris Kowalik

- » ProFeds Founder
- » Developer of the FedImpact Retirement Workshop
- » Host of the FedImpact Podcast



Support Team

- » Standing by for your questions

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**3 Key Professionals
to Have in Your Corner**

**Why their involvement in your
retirement planning is critical to
getting it right**

Agenda

- » **THREE PROS:** who these professionals are and how to get started
- » **THE IMPACT:** how the advice these professionals give shapes your retirement success
- » **ROADBLOCKS:** the obstacles some face in this process and how to overcome them

THE 3 KEY PROFESSIONALS

The 3 Key Professionals

- » Financial Professional
- » Estate Planning Professional
- » Tax Professional



- » Sees the big picture view of the entire financial picture
- » Helps you to set goals & develops a clear plan
- » Creates specific strategies based on the plan to help you reach your goals

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**Estate
Planning
Professional**

- » Helps you articulate what you want to happen to your assets when you die or are incapacitated
- » Drafts legal documents such as wills, trusts and powers of attorney to ensure your wishes are properly documented

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**Tax
Professional**

- » Helps you to understand how to apply the tax law to your advantage (short & long-term)
- » Create a long-term tax strategy that takes into account your goals & considers the tax consequences of your legacy

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**Having these
professionals
work together is
the key to your
financial success**



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INSIGHTS & TIPS

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The Role Each Play



Right tool
right job

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Awareness vs. Expertise

Mile wide or
inch deep?



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The Importance of Communication

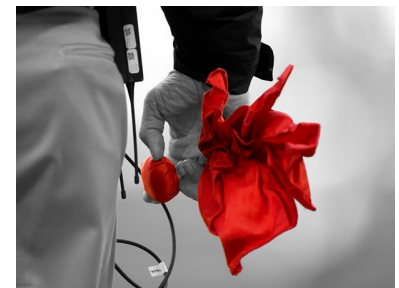


Don't operate
your financial
life in silos

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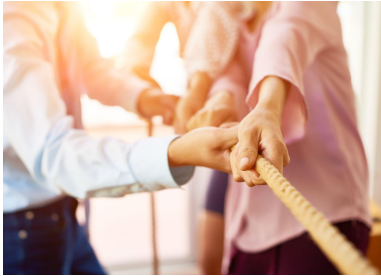
Throwing Red Flags

Challenging
strategy to
leverage
opportunities



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Leverage Each to Your Advantage

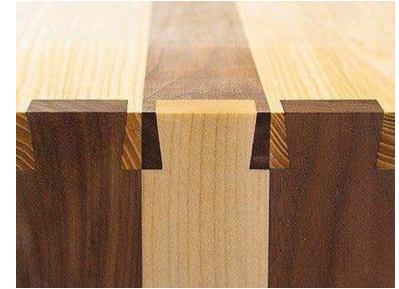


**Avoid friction
burns**

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When It All Comes Together

**Smooth
integration
makes all the
pieces fit
beautifully**



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OBSTACLES

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Obstacles in the Process

- » Not understanding the distinct roles that each of these professionals play in your financial success
- » Not being willing to pay these professionals for their time and expertise
- » Not knowing where to start or how to find these professionals

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NEXT STEPS

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How does this fit into the bigger picture?



DOUBLE-CHECK YOUR NUMBERS TO MAKE SURE YOUR RETIREMENT MATH IS ON TRACK

"The workshop you delivered yesterday was phenomenal. I enjoyed the presentation as well as the class participation and interaction."
U.S. Office of Personnel Management



"The most information I have ever received and heard in my ENTIRE military and retirement years."
U.S. Department of Defense



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Handouts and Replay



- » Handouts
 - Download
 - Emailed
- » Replay
 - Link will be emailed to all registered participants

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Next Webinar



- » Next webinar topic!
 - **Dialing in Your Best Retirement Date**
A review of the various factors that go into choosing an ideal date to retire from federal service
- » Sign-up at: [FedImpact.com/Webinar](https://www.fedimpact.com/Webinar)

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joining us**

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