



3 Key Professionals to Have in Your Corner

Presented by ProFeds

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

FedImpact
Retirement Training
presented by ProFeds

3 Key Pros to Have in Your Corner

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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- 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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- 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

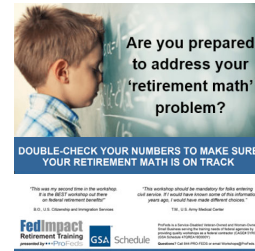
- Not understanding the distinct roles that each of these professionals play in your financial success
- Not being willing to pay these professionals for their time and expertise
- Not knowing where to start or how to find these professionals

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NEXT STEPS

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How does this fit into the bigger picture?



- Attend a workshop:
 - In-person training
 - No cost to attend
 - Covers all of the federal benefit topics and decisions to be made
 - One-on-one help available
- See all the details at FedImpact.com/Attend

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Handouts & 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

Find a workshop: FedImpact.com/Attend
Next webinar: FedImpact.com/Webinar



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for joining us

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