



## THE (UN) BROKEN RETIREMENT - SURVEY

### Top Questions to Know if your Retirement may Already be Broken

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|--|------|-------|
| 1. I/we know what expenses in retirement will be.  | True | False |
| 2. I/we know how much retirement income I/we will need over my/our lifetime and how it will be sourced.  | True | False |
| 3. I/we are clear if there is a retirement income gap and how best solve for the gap.  | True | False |
| 4. I/we know which of the 81 different strategies to use to maximize social security income over our lifetime is best for you?                         | True | False |
| 5. I/we've have reviewed (in detail) how inflation will erode your retirement purchasing power every year in your retirement and how to counteract it. | True | False |
| 6. I/we know which of the top 10 methods to use for asset drawdown that is the best to achieve your retirement goals.                                  | True | False |
| 7. I/we know what the "deferred tax trap" is and how taxation of retirement accounts (IRAs, 401ks) will impact my/our true retirement income.          | True | False |
| 8. I/we have reviewed an IRA conversion strategy showing the tax savings in retirement accounts over my/our lifetime.                                  | True | False |
| 9. I/we have a written <b>Retirement Income Plan</b> .   | True | False |
| 10. I/we have a written <b>Financial Plan</b> .  | True | False |
| 11. I/we know <b>HOW</b> to fund each of my/our family's financial goals for the future.   | True | False |
| 12. I/we know what I/we are invested in and why.   | True | False |



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| 13. I/we know our Risk Tolerance Score compared to the present-day Risk Exposure.  | True | False |
| 14. I/we have 100% confidence your current plan will provide the income it will take to achieve your retirement dreams.                                | True | False |
| 15. I/we have a planned on how we will minimize the impact to our financial situation if I/we experience a Long-Term Care event.                       | True | False |
| 16. I/we have a <b>pre-agreed upon</b> plan with your Financial Advisor on what the plan of action will be if the stock market were to suddenly crash. | True | False |
| 17. I have a written process for making sound financial decisions  | True | False |
| 18. My current advisor has frequently found me Money Falling Through the Cracks  | True | False |
| 19. I have never made financial decisions based on myths, misconceptions, or incorrect facts   | True | False |

**Scoring:** How many False Answers did you have? Write the number here? \_\_\_\_\_

There are nineteen questions in this survey, if you have **5 or more False Answers**, then your retirement may already be broken.

### **What can you do now?**

If you are ready to **(UN) Break** your retirement and significantly improve your future financial outcome, then do what so many people with broken retirements have already done and contact us for a no cost, no obligation **(UN) Break my Retirement Discovery Session**.

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