

7 Steps to Successful Retirement



Financial Center Federal Credit Union

Sales and Marketing

Daniel T. Kavanaugh, CFP

Chief Sales and Marketing Officer

7101 East 56th Street

Indianapolis, IN 46226

(608) 576-7226

dkavanaugh@fcfcu.com



Financial Services For DFAS Employees

You are our owners!
Convenience with a Smile
Services based on member requests



Successful is Purposeful and Rewarding

Getting you from where you are today
to where you want to go tomorrow



#1 - Set Your Personal Goals And Objectives

- Lifestyle
- Location
- Recreation
- Reinvention



#2 - Assess Your Personal Situation

- Net Worth/Assets
- Expenses
- Income Needs
- Income Sources



#3 – Assumptions Make a Huge Difference

- Longevity
- Inflation
- Rates of Return



#4 – Run Your Numbers

- Planning Software can help
- First 5 Years may be different
- “What If’s” are important



#5 – Adjust Your Investments

- Risk Tolerance
- Asset Allocation
- Preserve and Protect
- Advisory Services



#6 – Develop Your Plan

- Income Distribution Options
- Estate Updates
- Insurance Considerations



#7 – Simplify and Enjoy Life

- Reconnect with family and friends
- Spend time on what you like
- Auto Pilot your financial affairs



How Finance Center FCU Can Help

- Paying higher rates of Return on Deposits
- Charging lower rates on loans
- Free Services – Rewards Checking
- Investment and Retirement Planning Assistance



Bank Transfer Day – Nov 5th

Refer a friend, neighbor or family member
\$25 for you and the referral



Thank You for Your Trust and Loyalty

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