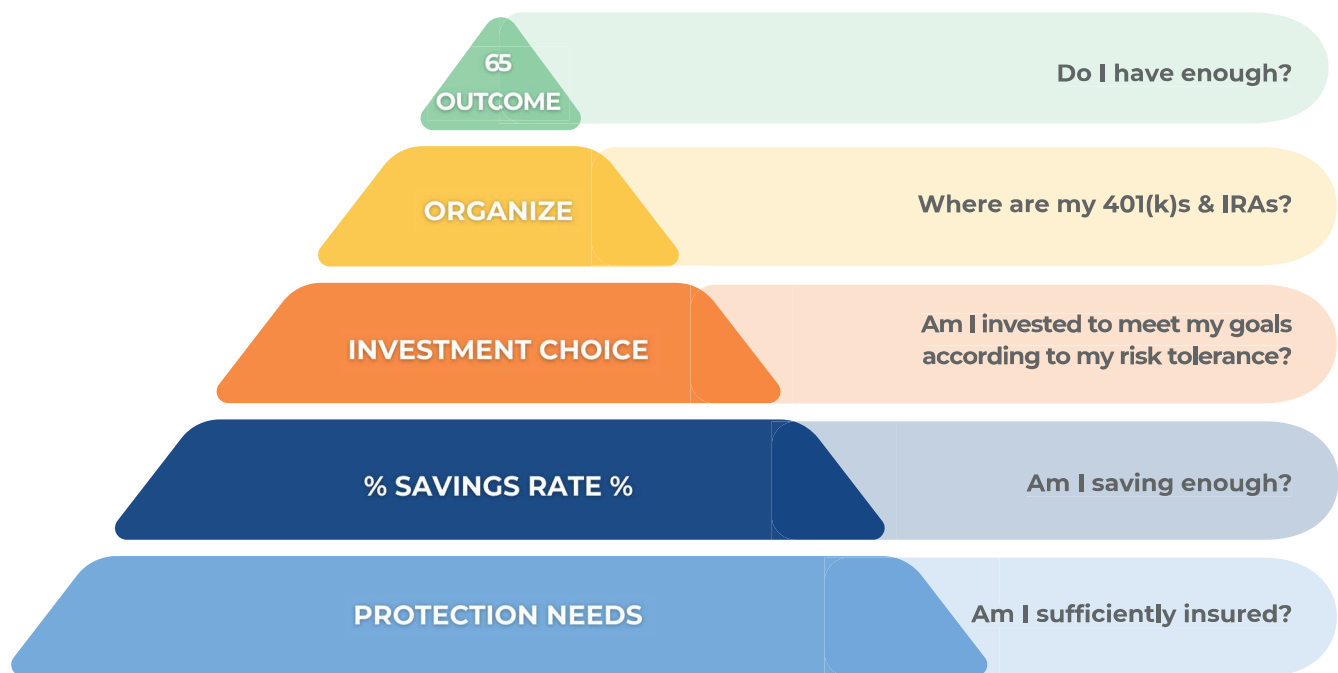


# WHAT'S YOUR STRATEGY?



## DC Retirement Strategies' focus and service is holistic:

- Asset Allocation Education
- Estate / Life Insurance Reviews
- Retirement Planning & Projections
- Saving "Enough" Analysis
- Distribution & Income Planning
- Account Reviews

At DC Retirement Strategies, we understand the importance of helping our clients plan for their financial goals in all economic situations. Whether it's a thriving market or a challenging one, we remain dedicated to a disciplined, long-term investment approach to ensure success.

Our team of business professionals are here to offer you the guidance and support you need to help achieve your financial aspirations. We provide an array of resources and products to help you implement strategies that are tailored to your individual needs.

We help individuals set and plan for personal goals – utilizing the following products and services:

### Investments

- Mutual Funds
- Annuities
- IRAs/Roth IRAs
- Stocks
- Bonds
- Asset Allocation Programs

### Protection Needs

- Life Insurance
- Disability Income Insurance
- Employer Group Benefits

### Wealth Transfer Strategies

- Estate Planning
- Split Dollar
- Irrevocable Life Insurance Trust (ILIT)



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# Create Your Plan!



Thank you for your interest in financial wellness! To get things started, we'll need to gather information on you and your family.

Please complete the below information and return the completed form to [Dane@DCRetirement.com](mailto:Dane@DCRetirement.com).

## Questions?

**Dane Carlini**

[Dane@DCRetirement.com](mailto:Dane@DCRetirement.com)

402-401-2439

### Personal Information:

SPOUSE 1		SPOUSE 2	
Full Name		Full Name	
DOB		DOB	
Employment Status		Employment Status	
Employer		Employer	
Job Title		Job Title	
Annual Income		Annual Income	
Email		Email	
Phone Number		Phone Number	
Mailing Address			

### Family Information:

Children Name	Age/DOB	Marital Status	Employment/Affiliation
1			
2			
3			
4			
5			

# Create Your Plan!



## Retirement Income:

SPOUSE 1		SPOUSE 2	
Social Security Estimate		Social Security Estimate	
Pension Income		Pension Income	
Part Time Employment		Part Time Employment	
Other:		Other:	

INVESTMENT ACCOUNTS	Description/Owner	Approximate Value?	Contributions?	Company Match?
Bank Assets:		\$		NA
Retirement Plan:		\$		
Retirement Plan:		\$		
IRA:		\$		NA
Roth IRA:		\$		NA
529 Plans:		\$		NA
Other:		\$		NA
Other:		\$		NA
Other:		\$		NA

**\*Please include copies of current statements (if applicable)**

## Insurance:

INSURANCE POLICIES	Group Coverage?	Term Policy?	Permanent Policy?
SPOUSE 1			
SPOUSE 2			
Are there any Disability Policies?			

## Inheritance, Expenditures, Company Ownership, Valuable Assets, Real Estate, Notes, Other:

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# Are you on track for retirement?


### Jack & Jane's Goals

#### Needs



##### Retirement - Annual Living Costs


Jack (2032) 67  
Jane (2032) 67  
Both Retired (2032-2057) \$100,000  
Jane Alone Retired (2058-2059) \$81,000



##### Health Care


Both Medicare (2032-2057) \$10,496  
Jane Alone Medicare (2058-2059) \$6,591

#### Wants



##### New Vehicle


In 2027 \$30,000



##### College - For Children

4 years starting in 2024  
Attending College - Public In-State (4 years) \$27,330

#### Wishes



##### Travel

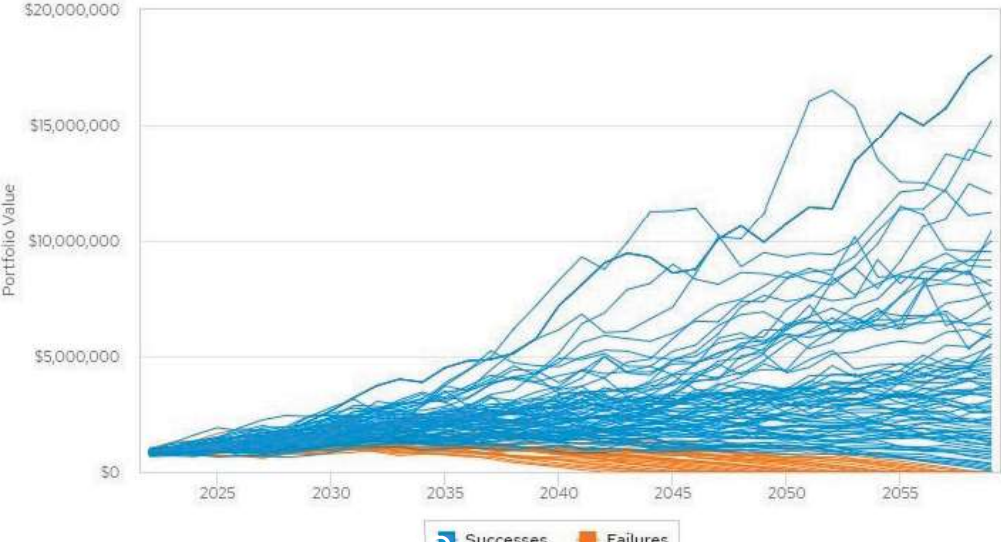
When both are retired  
Recurring every year for a total of 10 times \$6,500

Description	Owner	Current Value	Annual Additions
<b>Manual</b>			
Checking/Savings ⓘ	Joint Survivorship	\$45,000	
Former Employer 401(k) ⓘ	Jane	\$200,000	
Roth IRA ⓘ	Jane	\$50,000	\$1,200
XYZ Company 401(k) ⓘ	Jane	\$150,000	\$12,000
ABC Company 401(k) ⓘ	Jack	\$350,000	\$10,400
<b>Total All Assets</b>		<b>\$795,000</b>	<b>\$23,600</b>

### Current Scenario


Unfortunately, because no one knows what the future returns will be, there's not a simple Yes or No answer.

That's why we run 1000 Trials of your plan using 1000 different return possibilities to calculate the probability your plan will be successful.




**730 Successes**  
1000 Trials

=



**73%**  
Probability of Success  
In Confidence Zone


Explore



**Tip**

Is 73% a good result?

Find Out

 18205 Capitol Ave. Ste. 300, Elkhorn, NE 68022

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 DCretirement.com