



NAVIGATE RETIREMENT WITH CONFIDENCE WORKSHOP



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WORKBOOK

Discover 5 Essential Action Steps To Live
With More Certainty About Retirement

with Michael Hakoun

FEBRUARY 13TH • WWW.LEDYARDWORKSHOP.COM



DEAR WORKING PROFESSIONAL / BUSINESS OWNER THINKING ABOUT RETIREMENT OR RETIREE,

You probably are asking yourself: *Will I have enough to live the life I want?*

We know that one of the greatest struggles for people who are approaching or in retirement is ensuring they will not run out of money. So often you are watching the news or talking with friends and while thinking about the future, this same fear of not having enough repeats itself.

Are you hoping one day to finally find peace of mind, feel confident and know that you're going to be ok in my retirement?

The uncertainty around whether you will have enough for retirement is about to change...

We created the Navigate Retirement with Confidence Workshop to help those approaching and in retirement discover the peace of mind you've been looking for, without the stress of trying to navigate on your own.

Over the past 30 years, we've helped over a 1000 clients reach their financial goals and starting on February 13th, this is your opportunity to do the same in an interactive experience.

BY THE END OF OUR TIME TOGETHER, YOU'LL KNOW THE 5 ESSENTIAL ACTION STEPS TO LIVE WITH MORE CERTAINTY ABOUT RETIREMENT.

DAY 1

The Psychology of Successful Retirement - *Finding Purpose in your next chapter*

LEDYARD
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NAVIGATE RETIREMENT WITH CONFIDENCE

5 DAY WORKSHOP

Homework:

1. What is your biggest personal mindset challenge in thinking about retirement?

2. What emotions come up when you think of transition associated with retirement?

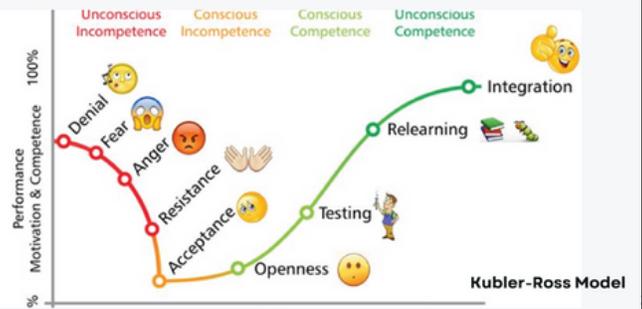
3. What purpose would you like to connect with in your retirement years?

4. What is one behavior that will serve you well as you navigate the retirement journey?

ESSENTIAL ACTION STEP

Finding Purpose in Your Next Chapter

Embracing Change



WHAT IS MY KEY TAKEAWAY FROM THIS SESSION?

DAY 3

The top 5 mistakes investors make and how to avoid them

NAVIGATE RETIREMENT WITH CONFIDENCE

5 DAY WORKSHOP

Homework:

Think about the last few investment decisions you made. Where did your information come from? Was it reliable and from credible sources?

How can you improve your inputs so that they can make better investment decisions.

ESSENTIAL ACTION STEP

The top 5 mistakes investors make

1. Getting in and out of the market at the wrong time
2. Investing in what is popular
3. Not managing investment costs judiciously
4. Basing decisions on bad information
5. Building portfolios one interesting investment at a time

WHAT IS MY KEY TAKEAWAY FROM THIS SESSION?

