



Retirement Income Planning and Investment Management with Investment Planning Group

We help people evaluate and craft retirement income planning solutions. If we develop a successful working relationship, we can help you to plan for a successful retirement.

Keys to a Successful Relationship: What You Can Expect

You can trust that we will consistently and responsibly perform all requested services and that we will be available when you need us.

We will:

- Treat you with respect, honesty and dignity.
- Act as your advisors, putting your interests first.
- Strive to acquire a complete and accurate understanding of your planning preferences, goals and needs.
- Explain the implications of the strategies and products we propose.
- Update you by email, mail and phone.
- Meet with you regularly to review your accounts and strategies and adjust as needed.

Keys to a Successful Relationship: What We Can Expect

Effective communication and mutual respect are essential to a successful partnership, so I expect:

- Trust
- Respect
- Honesty
- Complete disclosure
- Sincerity
- Commitment

We expect you to understand that any recommendations are always based on your best interest. As our client, you need to know that all recommendations will be based on the information you provide to us. We expect you to participate enthusiastically in the process.

Keys to a Successful Relationship: Mutual Responsibilities

Working together is essential. To this end, we both need to make your financial strategies a priority. We will agree to keep each other informed of any new developments that might affect these strategies. And we will agree to take the time to regularly review your accounts and strategies. We will both be honest and forthcoming about your financial situation. We will work to develop mutual trust, respect, and understanding.



Investment Planning Group

Lee Mathie

Jim Phelan

Financial Advisors

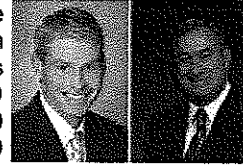
Pocatello and Blackfoot, ID

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Retirement Readiness Quiz

Take the short quiz and see how confident you are that you have addressed all of the risks.

Know Don't Know Current Risk Strategy

Please note

1. How many years will you live in retirement?
2. How does longevity affect funding a retirement that could last 30 years or longer?
3. Will you outlive your money or will your money outlive you?
4. How big of a nest egg do you need set aside as you enter retirement so your money lasts your lifetime?
5. What is the appropriate spending rate from a nest egg.
6. How long will your money last if you stop working today?
7. If you have a retirement shortfall what can be done about it?
8. How does the rising cost of health care affect your retirement income planning?
9. What is the optimum age for you to retire to maximize your benefits?
10. What percent of pre-retirement income should you use as a benchmark to maintain your standard of living in retirement?
11. What is the proper mix of stocks versus bonds in your retirement portfolio?
12. How important is leaving a financial legacy?
13. Taking everything into account, is your retirement income plan sustainable?

The more "Don't Know" answers you have, the more you may benefit from our retirement strategies and solutions.

Refer a friend

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Any tax strategies discussed are general in nature and not directed at any particular individual or situation. A CPA or tax planning specialist should be consulted before implementing any tax reduction or planning strategy.

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