

FIVE KEY STEPS

Retirement



Retirement can be much like building a house. It takes exceptional planning and execution to get it right. These **Five Key Steps** are designed to help you avoid the costly mistakes others have made during their retirement years. We have created a **FREE** online webinar that goes into greater detail. **Come Watch!!!**

1

MAXIMIZE YOUR PENSION and SOCIAL SECURITY

Pensions are a KEY part of your retirement. You ONLY get one chance to make the right decision. Choosing the right option can make a huge difference for both you and a spouse. **Learn how to use a Pension Maximization strategy.**

2

PROTECT YOUR MARKET RISK INVESTMENTS

LEARN INVESTING STRATEGIES. With market volatility going up and down, using a **SAFE** and **RISK** Growth option can help you bounce back from the negative market downturns faster. **Learn how to avoid a Sequence of Returns dilemma!**

3

BUILD A RETIREMENT PLAN THAT WORKS

Planning mistakes are costly. Retirement requires a solid blueprint executed with excellence. There are specific strategies we utilize with Taxes, Market Risk, and unseen Medical expenses. **IF YOU FAIL TO PLAN, YOU PLAN TO FAIL...**

4

MINIMIZE TAXES IN RETIREMENT

DOES YOUR CPA GIVE YOU ADVICE? Implementing a solid tax strategy allows you to utilize a system of potentially reducing taxes over your lifetime. Take the steps you need to be tax-efficient. **WHY PAY MORE TAX THEN YOU NEED TO???**

5

Long-Term Care / Asset Protection

Over 70% of those in retirement will incur Long-Term Care expenses. A proper strategy of leverage can protect much of your assets from being depleted. Learn the strategies of how to leverage assets to cover expenses. **SAVE YOUR MONEY!**



Corbin Lindsey
Financial Advisor

Welcome to Birdseye Financial

We help individuals, families, and businesses plan for a secure future through education and cutting edge financial strategies. We believe that no two individuals or businesses are alike and for this reason, we are dedicated to giving our clients the personal attention they deserve. Our financial solutions are as unique as our clients.

Birdseye Financial offers a full range of financial products and services. We believe that tax planning strategies, retirement income planning, and estate conservation should be top priorities for individuals and families of all ages and income levels. Because many people regard financial strategies as complex and confusing, they often miss out on many financial strategies that exist for them. They also tend to take unnecessary risks and fail to adequately protect their assets.

Birdseye Financial specializes in estate planning for all sizes of estates, large and small. We help clients look at different methods to help reduce or eliminate unnecessary taxes such as income taxes, social security taxes, and estate taxes. In addition, we help clients avoid probate, increase spendable income, and protect against Medicaid spend-down of assets when Long-Term Care is needed. We help our clients in all areas of importance.

WHERE WE SPECIALIZE

- ◆ Fixed Index Annuities
- ◆ Safe Money Options
- ◆ Risk Money Management
- ◆ Medicare and Long-Term Care
- ◆ Final Expense

WHAT WE DO

- ◆ Retirement Planning
- ◆ Income Planning
- ◆ Pension Max
- ◆ Social Security Max
- ◆ Risk Assessment

- ◆ Tax Strategies*
- ◆ Estate Planning
- ◆ Asset Protection
- ◆ Wealth Transfer

* Birdseye Financial does not offer tax or legal advice.