RETIREMENT WORKSHOP

Navigating My Retirement Years

At FM Financial, we believe living a life of *Stewardship Well Done* involves planning with purpose, investing with discipline, and giving with joy. Each of the services we offer is designed to help you excel in these areas. From time to time we conduct workshops to help educate and prepare you for various experiences along your financial journey.

Retirement is a new chapter filled with opportunities—but are you prepared to navigate it with confidence? We have designed the ***Navigating My Retirement Years*** workshop to help you make informed decisions regarding the funds you have diligently saved for retirement. If you've ever wondered how your retirement contributions become retirement income, you are in the right place. Join us as we explore key retirement planning strategies, income management, and ways to make the most of your resources. Whether you're newly retired or planning ahead, this workshop will provide valuable insights for your retirement journey.

WHAT TOPICS WILL BE COVERED IN THE WORKSHOP?

Navigating My Retirement Years addresses the five concerns we hear most often from clients regarding their retirement planning:

- Do I have appropriate expectations for retirement?
- When should I retire? How will I fund my life after I stop working?
- What should I do with my retirement accounts?
- What happens to my spouse/family if something happens to me?
- How do I provide for my family and ensure my wishes are carried out?

Scan the QR code or visit
www.fmfinancial.org
to see our schedule of upcoming workshops and get registered.

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HOW CAN I ATTEND THE RETIREMENT WORKSHOP?

The easiest way to attend is to check out our schedule of upcoming workshops (virtual and in person) at fmfinancial.org and register for the date that fits your schedule. Whether you attend virtually or in person, you'll receive the same valuable guidance and insights to help you plan for a secure and confident retirement.

WHAT TO EXPECT DURING THE WORKSHOP:

- The 60 minute workshop will start promptly on time.
- You will be provided with a workbook.
- Following the presentation, there will time for Q & A.
- You will likely have some homework to do after the workshop in order to apply the material to your unique circumstances ... but don't worry, we will prepare you to complete it successfully!

HOW SHOULD I PREPARE FOR THE WORKSHOP?

It will help if you have recently reviewed your current budget and have your income/expenses in mind. Also, take time to document your retirement questions and bring them with you.

CAN I SCHEDULE A WORKSHOP FOR MY CHURCH?

If you are interested in hosting a virtual or in-person workshop for your church, please contact us at info@fmfinancial.org or (800) 325-8975. We will put you in contact with one of our Directors of Regional Partnerships (East - Steven "Mac" Macaluso; West - Carol Duberowski).