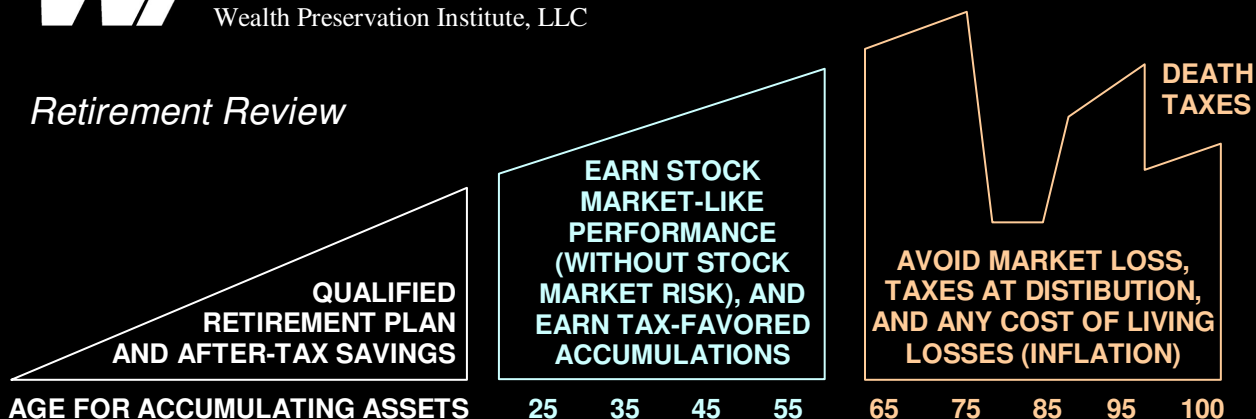




Wealth Preservation Institute, LLC

Retirement Review



STOCK, BOND AND CASH MIXTURE...OR EQUITY INDEX PLAN w/ RETIREMENT PROTECTION

Retirement Review was designed to eliminate portfolio losses

A complete and unbiased analysis of your IRA, pension, and other retirement assets is necessary for retirement minded individuals (as well as those already in full time retirement). Cash flow, maintenance, and emergency funds, in combination with life expectancy, inflation, and taxation, are all calculated to project possible funding scenarios for retirement distributions, cash flow, spousal support, and future gifting.

Our **Retirement Review** service helps pre- and post-retirement clients reduce their potential qualified plan losses (due to investment risk, inflation, taxes and penalties) by thoroughly reviewing the most recent options for secure income stream benefits or future IRA stretch-outs (i.e., generational IRA planning), especially for surviving heirs.

CASE STUDY #1 : Couple is exposed to unnecessary amount of risk in their first few years of retirement. IRAs are heavily invested in growth stocks, which soon lose substantial value. WPI selects a SAFE alternative with market-like potential, but guaranteed retirement income protection. WPI also found a 10% lifetime cap rate.

CASE STUDY #2 : Children of a successful family are expecting a small inheritance from their parents estate. Their mother inherits her husbands IRA, and lives well off the minimum distributions. However, soon after her unexpected death, the children are told the entire \$2,000,000 IRA must be distributed, and that it is entirely taxable. The children receive only \$500,000 net of taxes. They are furious at the CPA and tax attorney for not warning them of the qualified plan's high tax burden.

For more detailed information on select WPI, LLC Financial Reviews® please refer to our individual offerings and white papers.

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