

CHAPTER 14 - KEY FACTS REVIEW

Q1: What are the foundational programs that retirement plans should be built upon?

- a) Medicare and Social Security.
- b) Gold, Silver and Precious Metals.
- c) The Stock Market.
- d) A good safe deposit box.

Q2: What is a very valid fear among people entering their retirement years?

- a) Stock market volatility.
- b) World unrest.
- c) Unpredictable inflation.
- d) That they will outlive their assets.
- e) All of the above.

Q3: What are the 3 strategies that most Financial Service Professionals use to address income needs in retirement?

- a) “Distribution,” “Bucket,” and “Product.”
- b) “Hope,” “Wish,” and “Pray.”
- c) “Dream,” “Divest,” and “Disperse.”
- d) “Uncover,” “Discover,” and “Recover.”

Q4: What is the optimal way to build income in retirement?

- a) Use the LARGEST amount of your assets to generate the highest paycheck possible.
- b) Use the LARGEST amount of your assets to speed up your returns.
- c) Use the SMALLEST amount of your assets to generate the fastest paycheck possible.
- d) Use the SMALLEST amount of your assets to generate the highest paycheck possible.

ANSWERS: a, e, a, d.

If you want to discuss your Social Security and Medicare choices, please call us at **1-800-279-1261** and one of our volunteers will be glad to help at no cost to you whatsoever.