RETIREMENT ROADMAP

6 MONTHS

Examine Income Update Budget

Analyze Cash Flow

12 MONTHS

Choose Retirement Date

Review Healthcare

Meet with EWM team



ECON WEALTH MANAGEMENT

REAL. ACTIVE. SOLUTIONS.

3 MONTHS

Meet with HR Decide on Social Security Schedule 1 Month Meeting

1 MONTH

Meet with EWM Team Discuss Rollover Options Recommend Strategies

WELCOME TO RETIREMENT!

Important Disclosures: This information is not intended to be a substitute for specific individualized tax, legal, or investment planning advice. Where specific advice is necessary or appropriate, you should consult with a qualified tax advisor or CPA. This example is hypothetical and provided for illustrative purposes only. It is not intended to represent any specific investment products and not intended to be reflective of results you can expect to achieve.