

Free Online Assessment



Sequence Risk Assessment

Sequence risk becomes a danger for individuals preparing to retire in 5 years and for retirees taking withdrawals in the first 5 years of retirement.

Why It Matters

The sequence of returns may significantly impact the amount you want to accumulate before retirement or the amount of spending during retirement. Two retirees with identical wealth can have entirely different financial outcomes, depending on the state of the economy when they start retirement.



What information do we need to complete your assessment?

- ✓ Retirement Date
- ✓ Amount of Monthly Income Needed
- ✓ Amount of Guaranteed Income Expected
- ✓ Statements of All Investment Accounts (e.g. IRA, 401k, 403b, brokerage, mutual funds)

Who do I contact when I want to begin?

Contact Corie Coyne at corie@marcalifeplanning.com. She will provide you with the next steps on your **FREE** assessment!