

GREG AND LINDA, THIS IS YOUR PLAN

Your money lasts until Greg is 95 and Linda is 93, in every version we tested.

You told us you wanted “a plan we can actually follow.” Here it is. You only need to read four short documents, about 20 minutes in all.



FIRST · WITH THIS FOLDER

Watch Marc's short video

Marc walks you through the plan in a few minutes.



4 PAGES · 7 MINUTES

Your Plan

Can we retire? How much can we spend? Will it last? Page 2 has the short answer to every question.



3 PAGES · 5 MINUTES

Your Money Moves

Where your paycheque comes from: which account, which month, how much, and what to do every year. This is the one to share with your advisor.



3 PAGES · 5 MINUTES

Your Questions, Answered

Every question you asked us, in your own words, with a short answer.



2 PAGES · 3 MINUTES

What This Plan Found

Ten moves and what each one is worth to you.

The Reference folder

You never have to open it. It holds the details, if you ever want them: your Retirement Handbook (the how-to manual), Your Choices (four ways retirement could go, side by side), the technical report and a year-by-year spreadsheet. Your advisor can use it too.

Questions any time: marc@glacierfinancial.ca