

# LIFE'S A JOURNEY

## ROAD MAP

### Rethinking Longevity & Retirement A New Perspective on Planning

With today's retirees spending up to thirty years — one third of their life in retirement, the traditional form of retirement is changing *and* the planning is evolving to a broader, more holistic focus of *Life Planning*. Today's longevity requires a *revised* road map with a new approach and understanding of the psychology to investing, financial planning, longevity, *and* retirement in order to help people better prepare for this new life stage.

### Life Planning vs. Retirement/Financial Planning

**It's more than just the Money; it's their LIFE!**

#### Longevity Management

**LifeSpan** - How long will we live?

**HealthSpan** - How well will we live?

**WealthSpan** - How will we finance it?

### R.O.L. (Return on Life) vs. just R.O.I. (Return on Investment)

Navigating this revised life course requires a Guide who understands longevity and the new role of Life Planning in conjunction with Retirement/Financial Planning.

#### Life Planning

**Longevity • Financial • Health • Life Stages • Residence • Reinvention**

Work • Volunteer • Community • Legacy • Purpose • Travel • Spiritual

Adult Children • Empty Nest • Grandparenthood • Caregiving • Widowhood

**The straight and narrow path to retirement is now a twisting, turning road that requires a plan to navigate the LifeSpan, HealthSpan and WealthSpan and how to protect each one.**