

Woodall Agency

I n s u r a n c e

Professional. Confidential. Personal Service.

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Retirement Planning Evaluation

You're saving and planning for your retirement. It is important to take a look at protecting those assets to maximize the positive financial aspects of your retirement.

1. Do you know your "number" - the amount of retirement savings you will need?
2. How do you plan to fund your future medical insurance premiums or long term care needs? ***Your insurance agent can help you know your number and advise you how to get there, with a tax favored strategy.***
3. How likely do you think it is that taxes will increase over the next 10-20 years? ***With the current challenges our economy faces most people think it's inevitable.***
4. How is your current retirement plan taxed? ***Will you have enough after taxes are taken out?***

Long Term Care Needs

A key part of any retirement plan must include funding for long term care.

1. Do you have a plan in place for funding long term care expenses for you and your spouse? ***With current costs skyrocketing, how do you plan to pay for that?***
2. What if one partner needs long term care and the cost of that care impoverishes the surviving spouse? ***Who will take care of that person?***
3. Do you worry about being a financial burden on your family in the event that you haven't saved enough to fund your long term care expenses? ***A long term care policy is essential for those who wish to be proactive in planning for these future expenses.***

There are a variety of ways to fund retirement plans and long term care expenses. Let us find the best solution for your needs.