

A photograph of an elderly couple standing in front of a white door with arched windows. The woman is on the left, wearing a blue jacket and a pearl necklace, smiling warmly. The man is on the right, wearing a blue shirt, also smiling. The background is a bright, sunny outdoor setting.

**Born Before 1958...
Secret Strategies to
Boost Your Income
in Retirement**

**21-Point Checklist Reveals Little Known
Private & Government Benefits Designed
to Boost Your Retirement Income Up to
\$3,321+ per Month**

Born Before 1958...Special Checklist Reveals Little Known Private & Government Benefits Designed to Boost Your Retirement Income Up to \$3,321 per Month or MORE

As much as Wall Street, Uncle Sam and the Media want you to think that Retirement Planning is an easy thing to do...the reality of the situation, it IS NOT!

The Complexity of Retirement Planning

Retirement planning is very complex with a ton of factors to consider.

Unfortunately for you, most of traditional retirement planning mainly focuses on the big things, such as saving a bunch of money in places THEY want you to believe are the best for you.

Even if those are the best places to put your money, is that all retirement planning is?

Traditional retirement planning focuses on those big "money" things, but they seldom if ever make sure the "*little things*" are being handled.

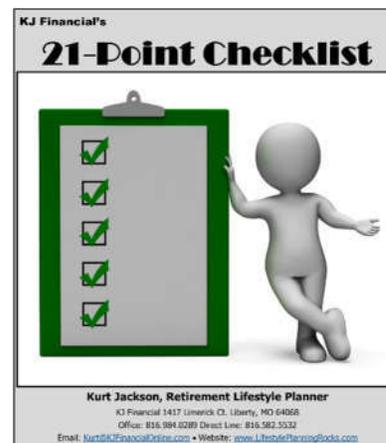
When Traditional Planning fails to fully address these "little things" the chances of your retirement getting derailed at the time you can least afford it skyrockets!

In over 28 years of helping people with money, basically living over a 1,000 financial lives thru clients, combined with our prior involvement in a nationwide consortium of over a 150 financial professionals having worked with more than 50,000 people...we've

been able to come up with a list of 21 "Little Things" that can and do pop up and derail retirements all too often.

21-Point Checklist

These 21 "Little Things" have been derived from 67 different data points and here's the sad part...of those more than 50,000 people that have gone through this 21-Point Checklist...the fewest things that have needed to be addressed was SIXTEEN.



Think about that, of the 21 little things that have been identified as sneaking up and causing retirees a lot of problems when they can least afford it, the FEWEST of the 21 that have been identified with clients is 16...SIXTEEN ...76%...is that a little or A LOT?

You're probably wondering what in the world are the 21 things, right?

It would take up way too much room and time to put them all here and there would

be no way to make sure you fully understood them.

If you don't fully understand them, could you really fix them?

However, we will share some of the benefits of making sure you have the "little things" really handled.

Amazing Annual Savings...

One of the points on the checklist has uncovered annual savings ranging from \$500 to more than \$20,000 and the average ranges between \$3,000 and \$4,000.

Imagine having that much more money in your pocket each and every year...couldn't that fund anything from a nice weekend getaway to a full-fledged luxury vacation each and every year?

Multiple Ways to Boost Lifelong Income...

Another area of emphasis on the checklist has been found to increase your lifelong income, a lifelong income almost every American has, by as much as up to \$1,000, \$1,500, \$2,000 or more each and every month of your entire retired life.

A recent update on our checklist has been able to identify whether or not you could boost the retirement income from your retirement assets up to 40% or more with the SAME money AND make it last your entire life.

Imagine how much your retirement would be improved if you boosted your

income that much with the same amount of your retirement savings?

This One Will Make You Sick to Your Stomach...

Another area of emphasis focuses on how a perfectly legal document, that everybody needs to have, will likely not do what you want it to do at an extremely important time in your life...a time you couldn't physically change it.

So Easy, Yet So Disturbing...

Another area determines how many of your assets you have incorrectly titled which could end up costing your loved ones time, money and a great deal of hassle to clear up after you're gone.

Imagine unintentionally dis-inheriting a grandchild, how horrible would that be? We've seen it happen and the 21-point checklist makes sure you'll never do that.

Want to Overpay Your Taxes...

One of the biggest fallacies of traditional retirement planning has you over-paying taxes throughout your retirement...no worries, the 21-point checklist has that covered and clients have saved up to \$100,000 or more in taxes throughout their retirement years!

Estate Directory...

In the past year or so, we've fine-tuned the 21-Point Checklist by going deeper with our Estate Directory.

After uncovering when clients completed the 21-Point Checklist, they had those little things covered for the most part, but

the one aspect of the 21 points that wasn't really being handled as well as it should have and that created problems for the client's loved ones after they were no longer with us.

Give Your Loved Ones the Gift of "Peace of Mind"

The Estate Directory wasn't getting completed properly.

The Estate Directory serves as a Roadmap for your loved ones to finalize your personal, financial and legal life after you're gone.

Without the Estate Directory, client's families were going on what amounted to a scavenger hunt to find all the info needed to finalize their loved one's personal, financial and legal lives...

As you can imagine, this was all happening at a time when they should have been able to take the time to properly grieve.

Once that was discovered, our process was reevaluated and now, we make sure the Estate Directory is fully and we mean fully completed.



We've discovered the Estate Directory is SO IMPORTANT to everybody, we'll even

help people that are NOT CLIENTS complete it.

It has become our mission to help make sure as many people as we can have a fully completed Estate Directory, even if we have to go to their house and help them complete it...well for those that are close enough to physically do it. For those that aren't we'll do it over the phone or virtually.

If we're doing it in person, we'll even grab take-out from your favorite restaurant, bring it to your house and complete it at the kitchen table while we eat dinner.

Where our previous process focused on completing the 21-Point Checklist, we now know by helping to complete the Estate Directory we have streamlined the process knowing full well all of those 21 points will be addressed.

When we're done addressing all 21 points in the Estate Directory you'll get an easy to follow summary of what you need to correct and or complete.

At that time you'll have a choice.

1. You can take that information and try to do it all yourself,
2. You can go back to your current advisor and ask them to help you complete it or,
3. You can ask us to help you.

Of course, option number three is our favorite!

Kurt Jackson, Retirement Lifestyle Planner

KJ Financial 1417 Limerick Ct. Liberty, MO 64068 • Office: 816.984.0289 Direct Line: 816.582.5532 •

Email: Kurt@KJFinancialOnline.com • Website: www.LifestylePlanningRocks.com

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If you go with our favorite option we'll have a discussion on how that works and we think you'll be pleasantly surprised how easy and affordable that option is.

You're never too old or too young to go thru this process. Our marketing efforts focus on folks in your age group because this age group is typically most open to thinking about these things...much more than someone in their 20's, 30's or even 40's would be.

Which is a shame, imagine identifying all the things that could be holding you back when you still have many years before retirement.

Easily, The Most Important Question You've Ever Been Asked...

Are you 100% certain your retirement plan has all these things properly handled?

Are you the exception to the rule...the only one of more than 50,000 people who have EVERYTHING handled?

Remember, the lowest number of things that needed to be corrected was 16...so, unless you're working with one of the 150 advisors around the country who are addressing these "little things" is your retirement plan really protected against these 21 little things?

How much do you have riding on having a successful retirement?

Can you afford to ignore the opportunity to make sure you have all these 21 things

handled AND have an Estate Directory completed for your loved ones?

Would you really want your loved ones to go on a big long scavenger hunt, wasting time, spending their own money trying to finalize your personal, legal and financial life?

We realize nobody likes talking about dying, there's nothing fun about it, but it is a fact of life and has a lot of things that need to be finalized by your loved ones after you're gone...

Don't you owe it to them to make sure that process is as seamless and easy as possible?

Since you've made it this far, Congratulations are in order...

You have taken the first step by requesting this Special Report!

Your work has only begun...now you must take that oh, so difficult step...

YOU. MUST. PICK. UP. THE. PHONE. AND. CALL. US. RIGHT. NOW!

Did we emphasize that enough? 😊

Call Kurt Jackson on his direct line at 816.582.5532 or email Kurt@KJFinancialOnline.com and set up a time for Kurt to either come out and complete an Estate Directory for you and your loved ones (or if you're out of our immediate area we'll schedule a phone or virtual appointment)!

Looking forward to hearing from you soon!