
Income for Life Blueprint

How Affluent Professionals Can Create Retirement Income That Thrives for 40+ Years... No Matter How Long You Live

Will Your Money Die Before You Do?

Why do so many 'fiduciary' advisors still build plans around the assumption you'll die at 84, when medical advances are pushing lifespans to 95, 100, or beyond?

What if your spouse lives to 105... will your plan still provide the lifestyle you want in year 40 of retirement?

If you could create income that outlasts you, would you want to see how?

Are You Planning for the Average... Or for Your Actual Life?

Did you know affluent professionals routinely outlive average projections, with many living well into their 90s and beyond?

Why do traditional advisors run simulations based on outdated life expectancy tables, ignoring the fact that medical breakthroughs are extending both lifespan and healthspan every year?

What's the real risk: running out of money, or running out of time to enjoy it?

The Consequence of Traditional Planning: A Life of Scarcity in Your Best Years

What happens if you follow a plan that assumes you'll die 'on time,' but you don't?

Will you spend your 80s and 90s watching every penny, cutting back on travel, experiences, and even healthcare... just to make your money last?

How would it feel to know your plan is built to thrive for 40+ years, not just survive for 20?

Why Most Advisors Miss the Longevity Revolution

Are you aware that most traditional plans use Monte Carlo simulations and 'safe withdrawal rates' that have been proven to overstate risk and drive retirees to underspend, sacrificing their lifestyle and still leaving a tax mess for heirs?

If your advisor hasn't updated your plan for the latest longevity data, medical advances, and the reality of 30–40 year retirements, whose interests are they really serving?

What's the cost of relying on hope and outdated models, instead of building a plan that adapts and grows with you?

Lifestyle-First Planning: Turning Longevity Into an Opportunity

What if you could embrace longevity as a gift, not a risk?

How would your confidence change if your income could increase every year, keeping pace with inflation, healthcare costs, and your evolving dreams?

Are you ready to see how affluent professionals are using lifestyle-first planning to create expanding income streams that grow stronger with age?

The Income for Life Blueprint: 5 Contrarian Steps to Outlast Your Money

Step 1: Redefine Your Retirement Horizon

- Are you planning for a 20-year retirement, or a 40-year adventure?
- Have you stress-tested your plan for living to 95, 100, or beyond?
- What would it mean to design your income for the longest, healthiest life possible?

Step 2: Build Expanding, Not Depleting, Income Streams

- Are you relying on a shrinking portfolio, or have you created protected lifetime income that grows with you?
- What if your income could increase every year, instead of decrease with age?
- Have you explored solutions that guarantee income for life, regardless of market performance or how long you live?

Step 3: Protect Against the Real Risks... Not Just the Market

- Is your plan built to withstand medical advances, rising healthcare costs, and the possibility of living decades longer than expected?
- How will you fund your lifestyle if you need specialized care in your 90s or 100s?
- Are you prepared for the 'Widow's Penalty,' RMDs, IRMAA surcharges, and the SECURE Act's 10-year rule for heirs?

Step 4: Optimize for Confidence, Not Just Accumulation

- Are you spending confidently, or are you underspending out of fear?

-
- Have you created at least \$3,000/month in guaranteed income (beyond Social Security), the benchmark shown to deliver the highest retiree satisfaction and peace of mind?
 - What would it feel like to know your lifestyle is protected, no matter what happens in the markets or with tax laws?
-

Step 5: Review and Adapt... Because Longevity Is a Moving Target

- When was the last time your advisor proactively updated your plan for new longevity data, tax law changes, or your evolving goals?
 - Are you getting annual, scenario-based reviews... or just a static plan that collects dust?
 - How would it feel to know your plan is always up to date and optimized for your real life?
-

Why I Refuse to Risk My Clients' Lifestyles on Wall Street's Promises

After nearly 20 years as a Certified Mortgage Planner, I watched too many professionals lose sleep (and money) because their advisors chased returns instead of protecting lifestyles.

Why do I avoid risky investments? Because I've seen firsthand how 'diversification' and 'market returns' can fail when you need them most.

If you could avoid the pain of market losses and still live your best retirement, would you want to see how?

The Questions Your Advisor Won't Ask (But You Should)

- How does your current plan adapt if you live 10–20 years longer than expected?
-

-
- What happens to your income if the market drops 30% in your first year of retirement?
 - Can your plan increase your income every year, or does it force you to cut back as you age?
 - Are you paying hidden fees that quietly erode your wealth year after year?
 - Is your advisor truly acting in your best interest, or just following industry scripts?

Ready to Create Income That Outlasts You?

If you're an affluent professional with \$500K+ in retirement accounts and you're questioning whether your current approach truly serves your lifestyle goals, I invite you to take the next step:

Schedule your complimentary 15-minute Retirement Health Check call.

This isn't a sales pitch. It's a focused conversation to help you:

- Identify gaps between your current plan and your real lifestyle needs
- Discover strategies that successful retirees use to create income that thrives for 40+ years
- Learn how to turn your retirement savings into a lifestyle enhancement machine

To request your 15-minute Retirement Health Check, click [HERE](#) to book on my calendar.

There's no obligation, and you'll walk away with clarity and confidence... no matter what you decide.

What's Your Retirement Really Worth?

Every day you delay creating a lifestyle-first, longevity-driven plan is another day you're settling for uncertainty instead of confidence, and hope instead of guarantees.

Are you ready to take control of your retirement lifestyle... and your future?

This document is for informational purposes only and does not constitute financial advice. Individual results may vary. Please consult with qualified professionals regarding your specific situation.

© 2026 KJ Financial and Kurt H. Jackson, Retirement Lifestyle Architect. All rights reserved.