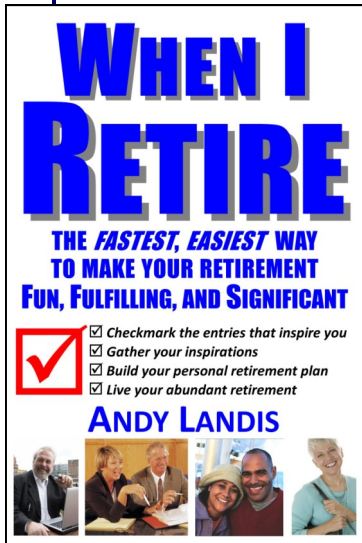


When I Retire

Fact Sheet for financial professionals



“Prior to making recommendations to the client, the financial planning practitioner and the client shall mutually define the client's personal and financial goals, needs and priorities. In order to arrive at such a definition, the practitioner will need to explore the client's values, attitudes, expectations, and time horizons as they affect the client's goals, needs and priorities.”

—Financial Planning Practice Standard 200-1, CFP Board of Standards

WHEN I RETIRE makes retirement goal-setting fast, easy, and fun! Not a financial guide, it walks your client through a life planning process to produce a time-weighted personal retirement plan—the ideal jumping-off point for financial planning, or a thoughtful client gift. Included are:

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“Andy Landis has given us the checklists for the rest of our lives!”
—Dan Kennedy, Career & Life Coach



Andy Landis is a nationally-known author, speaker, and consultant specializing in Social Security, Medicare, and retirement life planning. Andy has worked since 1977 with thousands of pre-retirees and retirees at Social Security, AARP, and multinational corporations. Through his practice, Thinking Retirement, Andy conducts seminars and webinars for the public, Fortune 500 firms, public employers, and financial advisors. Recent projects include contributing to the web video *Investment Smarts* for PBS and AARP.

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