



Plan for Living

You're the specialist in helping your clients build strong retirement plans.

The Plan for Living Workbook can help, outlining the major risks your clients face as they prepare for life after working.

You can use Plan for Living to identify concrete action steps with targeted questions and practical worksheets. It helps lay the foundation for better planning discussions, and more tailored solutions to your clients' unique needs.



This producer guide walks you through the workbook's main sections, so you can make the most of this valuable resource.



Using the Plan for Living Workbook

The Plan for Living Workbook is filled with information and worksheets you can use to help pre-retirees and retirees build a customized action plan. It is divided into three sections, presented as steps for your clients to take:



Know What Could Happen (Pgs. 2-7)

STEP 1

The first section takes your clients through three common retirement priorities:

- Making sure their resources last
- Preparing for unexpected health-related expenses
- Taking care of loved ones

For each priority, we suggest questions your clients should consider on topics like life expectancy, early retirement, and the cost of long term care.



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Create Your Plan for Living (Pgs. 8-14)

STEP 2

This section is where the majority of work will take place. It includes three worksheets:

- Expenses
- Income and assets
- Results sheet that identifies any gaps in retirement income

The section also provides background information on inflation, withdrawal rates, and Social Security, and how to incorporate them into retirement planning.



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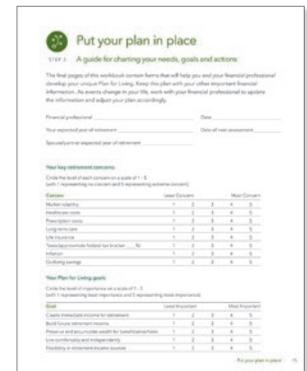


STEP 3

Putting the Plan in Place (Pgs. 15-17)

The final section of the workbook contains forms to help you and your client develop their Plan for Living. These forms capture:

- key retirement goals and concerns,
- ways to secure additional retirement income,
- and planned next steps.



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Building a Plan for Living

A great retirement has three pillars:

1. Readiness for unexpected health concerns
2. Enough resources to last a lifetime
3. A plan to take care of loved ones

As a financial professional, you're in a good position to help your clients build a retirement plan that's strong on all these fronts. The Plan for Living Workbook is your essential tool to get the job done.

Get started now at [Genworth.com/annuitysalescenter](https://www.genworth.com/annuitysalescenter).

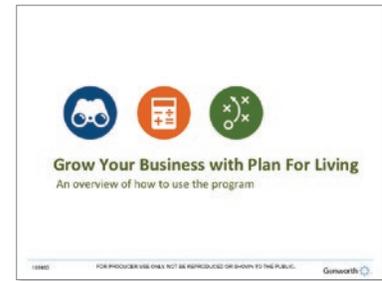
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