



Episode 39 — Meet the Retirement Solution Family — With Financial Planner Cindy Mueller  
(<https://YourRetirementSolution.podbean.com/feed.xml>)  
39-%e2%80%94-meet-the-retirement-solution-family-%e2%80%94-with-financial-planner-cindy-mueller/)

July 3, 2019

If you're ever at a dinner party and hear someone talking about the benefits of Roth IRAs, it's probably Cindy Mueller.

Today you will meet Cindy, a financial planner at The Retirement Solution, and learn why she's so passionate about Roth IRAs and helping people make the most of their savings.

In this episode, you'll learn:

- How Cindy's parents contributed to her love of finance
- Why Cindy was determined to work for a fiduciary company
- What her enrolled agent designation allows her to do for clients
- Why Cindy prides herself on doing the right, (and not necessarily easy) thing
- And more!

# You RE SO

Tune in now to learn about Cindy and how she's using her passion for saving to help clients reach their goals!

Resources: The Retirement Solution Inc.  
(<https://theretirementsolution.com/>)

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Episode 38 — Meet The Retirement Solution Family — With Business Development Lead, Kristen Lomax

(<https://YourRetirementSolution.podbean.com/episode/38-%e2%80%94-meet-the-retirement-solution-family-%e2%80%94-with-business-development-lead-kristen-lomax/>)

June 26, 2019

Kristen Lomax's days are dedicated to helping the community learn more about managing their finances.

As The Retirement Solution's business development lead, Kristen works in partnership with the Society of Financial Awareness to bring free financial workshops about over 30 topics to community businesses and organizations. Today, Kristen joins co-host Matt Halloran to share more about what she does, why she loves it, and who she is outside the office.

In this episode, you'll learn:

- How Kristen's childhood gave her a strong interest in finance
- Which financial topics baby boomers and millennials want to

learn about the most

- How Kristen defines success
- Why Kristen chooses the words “intentional” and “present” as a personal mantra
- And more!

Tune in now to learn more about Kristen and what she’s doing to boost financial literacy.

Resources: The Retirement Solution Inc. (<https://theretirementsolution.com/>) | Society of Financial Awareness (<http://www.sofausa.org/>) | [klomax@sofausa.org](mailto:klomax@sofausa.org) (<mailto:klomax@sofausa.org>) | (425) 615-1114

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### Podcasting

On Your Retirement Solution Podcast, we help to change and improve people’s lives by helping to identify the income they need and want to achieve their hopes and dreams in retirement. We call that freedom. Start planning to live the life you always dreamed of today. The purpose of our podcast is to provide financial education about retirement planning strategies and topics that affect today’s retirees.

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The  
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Questions  
That  
Everyone  
Misses

Episode 37 — The Non-Financial Retirement Questions That Everyone Misses (<https://YourRetirementSolution.podbean.com/episode/37-%e2%80%94-the-non-financial-retirement-questions-that-everyone-misses/>)

June 19, 2019

You've spent countless hours planning and putting away money for your dream retirement, and the big day has finally come. Now what?

Having helped hundreds of clients prepare for retirement, Jim Black knows there's much more that goes into retirement planning than just the numbers. Today, Jim is here to share what else you need to plan for to truly live out the retirement of your dreams.

In this episode, you'll learn:

- The importance of figuring out what you're going to do during your "third act"
- Why you may not actually spend less during retirement
- Why you should consider who you're going to spend your time with during retirement
- Why Jim tells his clients to go climb a tree
- And more!

Listen now and learn how to prepare for the big picture questions that lead to your happily ever after!


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— With  
Director  
of First  
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Lorena  
Epstein

Episode 36 — Meet The Retirement Solution Family — With Director of First Impressions, Lorena Epstein (<https://YourRetirementSolution.podbe36-%e2%80%94-meet-the-retirement-solution-family-%e2%80%94-with-director-of-first-impressions-lorena-epstein/>)

June 12, 2019

When you walk in the door at The Retirement Solution, the smiling face that is always waiting to welcome you is none other than Lorena Epstein.

As the director of first impressions, Lorena is all about making clients feel at home and ensuring they have a positive experience. Today, Lorena shares more about why she loves what she does and how her values and interests carry over into her personal life.

In this episode, you'll learn:

- Why the job posting for Director of First Impression caught Lorena's eye
- How she makes clients feel at home when they visit TRS' office
- How Lorena likes doing puzzles both in and out of the office
- What she would do with all the money in the world
- And more!

Tune in now to learn about Lorena and how she helps make The Retirement Solution feel like your home away from home!

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—With  
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Mike  
Whitmore

Episode 33 - Meet the Retirement Solution Family —With Financial Planner Mike Whitmore  
(<https://YourRetirementSolution.podbe33-meet-the-retirement-solution-family%e2%80%94with-financial-planner-mike-whitmore/>)

June 5, 2019

Mike Whitmore has experienced the life-changing effects of working with The Retirement Solution first-hand as a client.

Now, Mike is part of The Retirement Solution's team as a financial planner and helps change lives every day. Mike makes a special

appearance in today's episode to share more about his background, his interests, and the transformative work he does at TRS.

In this episode, you'll learn:

- How Mike came to join The Retirement Solution family
- Why family is so important to him
- Why Mike believes that time can be more important than money
- What success means to him
- And more!

Tune in now to meet another passionate member of The Retirement Solution's team, Mike Whitmore!

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— With  
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Associate  
Planner,  
Kyle  
Irion

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(<https://YourRetirementSolution.podbe35-%e2%80%94-meet-the-retirement-solution-family-%e2%80%94-with-lead-associate-planner-kyle-irion/>)

May 29, 2019

At The Retirement Solution, Kyle Irion plays a dual role.

From serving clients on the front-end as a lead associate planner to working behind the scenes to ensure that clients are well taken care of, Kyle helps out in many ways at The Retirement Solution. Today, Kyle shares a bit more about who he is, what he does, and why.

In this episode, you'll learn:

- How Kyle went from studying law to working in finance
- What Kyle does at The Retirement Solution as their lead associate planner
- What activity Kyle discovered a passion for after moving to Seattle
- Why one of his mantras is, "What would you do if you weren't afraid?"
- And more!

Tune in now to learn more about Kyle and how he helps The Retirement Solution clients achieve their happily ever after!

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(<https://theretirementsolution.com/>)

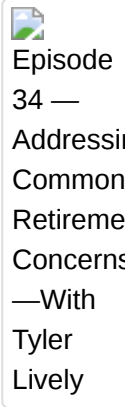
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Episode 34 — Addressing  
Common Retirement  
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Lively  
(<https://YourRetirementSolution.podbe.com/episodes/34-addressing-common-retirement-concerns-with-tyler-lively/>)

May 23, 2019

The Retirement Solution aims to be the last advisor you will ever need to work with to achieve your happily-ever-after retirement.

Today, financial planner Tyler Lively is pulling back the curtain at The Retirement Solution to showcase how exactly they help clients tackle their retirement concerns and get the retirement they've always dreamed of.

In this episode, you'll learn:

- Which retirement-question clients ask most often
- How The Retirement Solution team cultivates trusted, not transactional, relationships
- Why Tyler always aims to provide clients with options
- How Tyler and his team work healthcare costs into their written retirement plans
- And more!

Tune in now to learn more about the work Tyler does and how he helps address clients' retirement concerns!

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May 15, 2019

If you attend one of The Retirement  
Solution's community events, you  
might be lucky enough to run into  
Monica Palmer.

As The Retirement Solution's  
marketing lead, Monica is dedicated  
to supporting clients through all of  
life's events and educating different  
communities about retirement  
planning. In this episode, find out  
more about Monica's role and who  
she is as a person.

In this episode, you'll learn:

- How Monica became The Retirement Solution's marketing lead
- What she would do differently if she had an infinite amount of money
- How Monica defines success
- Why she has taken on the mantra: "I can't do everything and do anything well"
- How Monica's ability to pivot ties in with her proudest achievement
- And more!

Tune in to learn more about Monica, the creative and caring force behind this firm's events!

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May 8, 2019

## Episode 31 — Goal Planning for 2019

When looking back at 2018, do you feel you were properly prepared to deal the year's challenges? Did you end up spending more than you needed to?

Today, Jim Black discusses why it's important to set financial goals for the coming year, and what he recommends his clients do when planning for 2019.

In this episode, you'll learn:

- What you should look at when setting new financial goals for 2019
- The impact the new tax laws can make on your plan
- How planning to do the things you've always put off can benefit you in the long run
- Why you should plan for the unexpected
- And more!

Tune in now and start the new year right by taking control of your financial happily ever after!

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Matt  
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(<https://YourRetirementSolution.podbe.com/episode/30-meet-the-retirement-solution-family-%e2%80%94-with-associate-planner-matt-perrone/>)

April 3, 2019

Sometimes, visiting a financial planner can feel like seeing a doctor who's only looking to prescribe a standard fix for your problems. At The Retirement Solution, associate planner Matt Perrone likes to bring a more warm-hearted approach to clients, and dig a little deeper into their personal needs.

Today, Matt shares more about who he is and why he's passionate about his job, discussing:

- His favorite part of his job at The Retirement Solution
- His personal, historical and fictional heroes
- His proudest achievement
- What he would do if he became a millionaire
- The book he recommends to friends, family and clients
- And more!

Tune in now and get to know Matt and why he's such a valuable member of The Retirement Solution family!

Resources: The Retirement  
Solution Inc.  
(<https://theretirementsolution.com/>) |  
Matt Perrone's Bio  
(<https://theretirementsolution.com/team/matt-perrone/>)

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## Contact Us:

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[info@trsfamily.com](mailto:info@trsfamily.com)

## Links

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Inc

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