

LATEST POSTS



ESTATE PLANNING for PETS

Estate Planning For Pets

JULY 8, 2019

This week, Devin and John talk about a fascinating subject: estate planning for pets. When you're talking about estate planning, [...]

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9 Steps If You Expect Your Will To Be Contested

JUNE 23, 2019

This week, Devin and John talk about some ways to prevent problems if you anticipate a fight about your will. [...]

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MEET DEVIN



I'm Devin. I'm a husband to Karen,

dad to 3 kids and financial planner.

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MEET JOHN

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5 Things To Know About The Secure Act of 2019

JUNE 3, 2019



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Guess what! We finally bought the BigPictureRetirement.com name...but BigPictureRetirement.net will still work. This week's episode includes some reader questions and[...]

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Will Trump Save Social Security?

MAY 20, 2019

Recent news supports the theory that some of President Trump's policies may make the Social Security system more solvent. In[...]

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The Financial Abusers Playbook: Learn Their Secrets

MAY 6, 2019

Welcome back! This week, we're talking about a very difficult topic: financial abuse of elders. John and Devin received an[...]

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Spring Cleaning – the Financial Edition

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Medicare Buy-in at 50

MARCH 18, 2019

This week, Devin and John talk about the pros and cons of different ideas about expanding Medicare coverage to folks[...]

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Social Security Reform with Congressman John Larson

MARCH 4, 2019

This week, Devin is interviewing Congressman John Larson, sponsor of the The Social Security 2100 Act. This is the only[...]

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The 5 Types of Trusts (and when they are used)

FEBRUARY 18, 2019

This week, Devin and John talk about the types of trusts, and when to use them. Obviously, you can't cover[...]

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Illegal Immigration and Social

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This week, Devin and John talk about one of the big myths about Social Security. Devin sees these comments all[...]

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What You Need To Know About Medicare: Part 2

JANUARY 21, 2019

Danielle Roberts of BoomerBenefits.com is back again this week, talking with Devin about more Medicare issues. Danielle is an expert on[...]

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What You Need To Know About Medicare: Part 1

JANUARY 7, 2019

This week, Devin is talking about Medicare with Danielle Roberts of BoomerBenefits.com. Danielle is an expert on Medicare supplements and[...]

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Listener Questions: IRAs and Trusts, and Special Social Security Rules

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Listener Questions: Medicaid Estate Recovery and Social Security Myths

DECEMBER 10, 2018

It's been a while since we've had a listener question episode! Medicaid Estate Recovery and Powers of Attorney This week, [...]

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What Rights Do Grandparents Have?

DECEMBER 3, 2018

John deals with a lot of people in retirement, and many of those folks have grandchildren. Sometimes that is because the [...]

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Understanding Charitable Remainder Trusts

NOVEMBER 19, 2018

This week, Devin and John are answering a question from the Facebook group regarding charitable remainder trusts. (If you're not [...])

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This week, Devin is continuing the conversation about active versus passive investing with Rick Ferri, author of Smart Money. We[...]

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Active vs. Passive with Rick Ferri – Part 1

NOVEMBER 5, 2018

This week, Devin welcomes Rick Ferri to the show to talk about active versus passive investing. But before the interview[...]

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5 Lessons Learned From Previous Market Declines

OCTOBER 29, 2018

In light of the recent market activity, Devin and John thought it would be useful to re-broadcast their original episode[...]

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Social Security Survivor Benefits

OCTOBER 22, 2018

Don't miss the Big Picture

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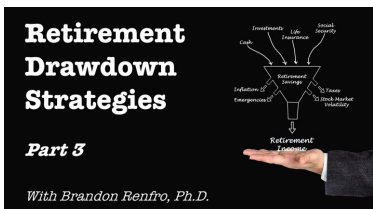


BIG Change Coming to VA Benefits

OCTOBER 15, 2018

Welcoming John back to the show, this week Devin and John are talking about some changes to an important benefit[...]

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Retirement Drawdown Strategies Part 3 With Brandon

Renfro, Ph.D.

OCTOBER 8, 2018

Back in the studio with Brandon Renfro, finishing the conversation about retirement drawdown strategies. If you missed Part 1 and[...]

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Retirement Drawdown Strategies Part 2 With Brandon

Renfro, Ph.D.

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strategies. According to multiple[...]

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Retirement Drawdown Strategies Part 1

SEPTEMBER 24, 2018

John is out for the next few weeks, and Devin has Brandon Renfro in the studio with him, talking about[...]

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Episode 90: 5 Social Security Mistakes With BIG Consequences

SEPTEMBER 17, 2018

Join us in the Big Picture Retirement Facebook group, where you can chat with Devin, John, and other listeners. There[...]

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Episode 89: You Can Buy WHAT In Your IRA?! Non-Traditional IRA Investments With Kirk Chisholm

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Join our Big Picture Retirement Facebook group, to join in the conversation with Devin, John, and other listeners. The last[...]

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Episode 88: Cryptocurrency Basics with Joe Saul-Sehy

SEPTEMBER 3, 2018

Have you noticed the new feature at the Big Picture Retirement webpage? There's a new button that lets you[...]

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Episode 87: Buying Your First Rental Property

AUGUST 27, 2018

Join our Big Picture Retirement Facebook group, to join in the conversation with Devin, John, and other listeners. In last[...]

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Episode 86: Rental Real Estate for Retirement Income

AUGUST 20, 2018

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Episode 85: 3 Estate Planning Tips To Avoid Probate

AUGUST 13, 2018

Join our Big Picture Retirement Facebook group, to join in the conversation with Devin, John, and other listeners. Y'all always[...]

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Episode 84: The Back Door Into The Beautiful Roth IRA

AUGUST 6, 2018

Join our Big Picture Retirement Facebook group, to join in the conversation with Devin, John, and other listeners. This week's[...]

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Episode 83: The Beautiful Roth IRA

JULY 30, 2018

Join our Big Picture Retirement Facebook group, to join in the conversation with Devin, John,

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The *RIGHT* Way
To Change Your
Will

Episode 82: The RIGHT WAY To Change Your Will

JULY 23, 2018

Join our Big Picture Retirement Facebook group, to join in the conversation with Devin, John, and other listeners. Howdy! This[...]

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Episode 81: What Do All Those Advisor Designations Mean?

JULY 16, 2018

Join our Big Picture Retirement Facebook group, to join in the conversation with Devin, John, and other listeners. Many industries[...]

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Episode 80: Are Granny Cams Legal?

JULY 9, 2018

Join our Big Picture Retirement Facebook group, to join in the conversation with Devin, John, and other listeners. This week's[...]

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Episode 79: Is It Ethical To Strategize To Use Government

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Join our Big Picture Retirement Facebook group, to join in the conversation with Devin, John, and other listeners. From the[...]

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Episode 78: The Ridiculously Inaccuracy Of Stock Market Predictions

JUNE 25, 2018

This week's episode is an encore presentation of a great episode that you might have missed before... If you listen[...]

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Episode 77: 5 Smart Reasons to File Early for Social Security

JUNE 21, 2018

This week's podcast has a special bonus: live video of Devin and John recording! Check it out! Join our Big[...]

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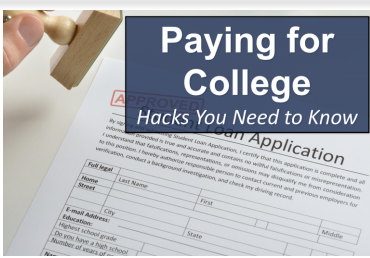


Episode 76: What You Need To Know About REITs with Brandon Renfro

JUNE 11, 2018

Join our Big Picture Retirement Facebook group, to join in the conversation with Devin, John, and other listeners. This week, [...]

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Episode 75: Is This Cheating the FAFSA? – Tips and Tricks for College

Financial Aid

JUNE 4, 2018

Join our Big Picture Retirement Facebook group, to join in the conversation with Devin, John, and other listeners. It's high[...]

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Episode 74: Part 2 of Using Medicaid to Pay for Long Term Care

MAY 28, 2018

Join our Big Picture Retirement Facebook group, to join in the conversation with Devin, John, and other listeners. In this[...]

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Episode 73: The Right Way To Qualify for Medicaid for Long-

Term Care

MAY 21, 2018

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**Individual
Stocks**

vs.

**Mutual
Funds**

Episode 72: Should You Be Investing In Individual Stocks?

MAY 14, 2018

Join our Big Picture Retirement Facebook group, to join in the conversation with Devin, John, and other listeners. Warren Buffett[...]

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The Danger

of

**Chasing
Dividends**

Episode #071: With Special Guest - Andrew Comstock, CFA

Episode 71: The Dangers of Chasing Dividends with Andrew

Comstock

MAY 7, 2018

Join our Big Picture Retirement Facebook group, to join in the conversation with Devin, John, and other listeners. This idea[...]

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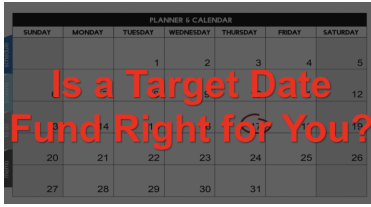


Episode 70: Does Your Credit Score Matter In Retirement?

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scores[...]

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Episode 69: Is A Target Date Fund Right For You?

APRIL 23, 2018

Join our Big Picture Retirement Facebook group, to join in the conversation with Devin, John, and other listeners. Managing your[...]

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Episode 68: Roger Whitney on Living Well Today While Planning For

Tomorrow

APRIL 16, 2018

Join our Big Picture Retirement Facebook group, to join in the conversation with Devin, John, and other listeners. In this[...]

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Episode 67: Is A Health Care Sharing Arrangement

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Join our Big Picture Retirement Facebook group, to join in the conversation with Devin, John, and other listeners. Today, Devin[...]

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Episode 66: Talking Trade Wars With David Stein

APRIL 2, 2018

Join our Big Picture Retirement Facebook group, to join in the conversation with Devin, John, and other listeners. In this[...]

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Episode 65: How Facebook and the Aging Population Might Impact Your Retirement Plan

MARCH 26, 2018

Join our Big Picture Retirement Facebook group, to join in the conversation with Devin, John, and other listeners. Devin and[...]

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Episode 64: Timing The Stock Market, and Protecting Social

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Join our Big Picture Retirement Facebook group to join in the conversation with Devin, John, and other listeners. Each month[...]

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Episode 63: How To Find A Tax Advisor

MARCH 12, 2018

(This week's show is a replay of an earlier episode.) Big picture retirement planning needs to consider tax, financial, legal,[...]

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Episode 62: Lessons From The Story of Jacob and Esau

MARCH 5, 2018

(This is a replay of a previously released episode.) Both Devin and John like to go out and talk to[...]

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Episode 61: What's The Best Age To File For Social Security?

FEBRUARY 26, 2018

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Should You Buy Long Term Care Insurance?

Episode 60: Should You Buy Long-Term Care Insurance?

FEBRUARY 19, 2018

Devin and John hear these questions all the time: How should I prepare for my long-term care? Should I buy[...]

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Are You Paying Too Much for Your Investments?



Episode 59: How Much Are You Paying For Your Investments?

FEBRUARY 12, 2018

When you get your investment statements, there's no line that says, "Here's how much you paid in total fees this[...]"

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Episode 58: Do You Need A Sexual Power of Attorney?

FEBRUARY 5, 2018

This episode is a tough one. Fascinating, and intriguing, but tough. As we know, age often comes with some health[...]

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Episode 57: The Amazon Effect and What It Means For Your Retirement

JANUARY 29, 2018

C'mon over and join us in the Big Picture Retirement Facebook group! We can see it in our towns, and[...]

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Episode 56: The Hidden Dangers of Leaving Inherited Property to your Heirs

JANUARY 22, 2018

Join us in the Big Picture Retirement Facebook group, where you'll find more conversation with others who are planning for, [...]

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Episode 55: A Serious Look at the Future of Social Security

JANUARY 15, 2018

You hear the headlines and the news clips all the time, saying things like "bankrupt Social Security" and "Social Security[...]"

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Episode 54: How To Have Your Best Year Ever

JANUARY 8, 2018

It's that time of year, when you make great plans for the upcoming new year. In this week's episode, Devin[...]

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Episode 53: The Impact of Trump's Tax Reform

JANUARY 1, 2018

The Tax Cuts and Jobs Act of 2017 has been signed into law by President Trump. Will we be making[...]

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Episode 52: Recent Predictions That Didn't Happen, and The Tattoo Factor

DECEMBER 25, 2017

If you listen to the news, you've probably heard some investment and financial planning industry folks make some wild predictions,[...]

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Episode 51: Podcasting from a Volkswagen Superbeetle, with Couple Money and the Retirement Answer Man

DECEMBER 18, 2017

This week, Devin and John are live at FinCon and recording out of the trunk of a Volkswagen Beetle. They've[...]

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Episode 50: Can You Have Too Much Cash? and Planning For The

Things You Hope Don't Happen

DECEMBER 11, 2017

It's Episode 50 of the Big Picture Retirement show! It's also the monthly listener questions episode, where Devin and John[...]

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Episode 49: How Millionaires Handle their Money, with Joe

Saul-Sehy

DECEMBER 4, 2017

This week's episode features Devin chatting with Joe Saul-Sehy

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Episode 48: Steps To Take Before The End of The Year

NOVEMBER 27, 2017

It's hard to believe, but we're getting close to the end of the year. There are any number of things[...]

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Episode 47: The Trump Tax Plan

NOVEMBER 20, 2017

Congress is moving fast through the process of changing our tax code, and there are a lot of details to[...]

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Episode 46: Is A Reverse Mortgage Right For You?

NOVEMBER 13, 2017

We've all seen the commercials for reverse mortgages, which allow you to access the value in your home without selling[...]

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Disability Benefits

NOVEMBER 6, 2017

This month's listener question episode is chock-full of fascinating information. Both questions delve deep into the rules of Social Security[...]

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Episode 44: Psychology, Passive Income, and Your Freedom Number With Clayton Morris

OCTOBER 30, 2017

This week, Devin invited Clayton Morris to talk about his voyage to success. Clayton is a successful real estate investor,[...]

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Episode 43: Digging Deeper Into Medicare, and Donut Holes

OCTOBER 23, 2017

Last week, Devin and John talked about the basics of Medicare. But Medicare is definitely not simple, so there's a[...]

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Episode 42: What Medicare Covers, and What It's Going To Cost

OCTOBER 16, 2017

Understanding Medicare is an important part of your overall retirement planning, but it's so confusing and complicated! Even Devin and[...]

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Episode 41: Does Your Debt Die When You Do? Plus...Other Listener Questions

OCTOBER 9, 2017

It's always good to get answers to your burning questions. Every month, Devin and John answer questions that have been[...]

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Episode 40: Keeping It Simple With Doug Goldstein

OCTOBER 2, 2017

This week, Devin interviews Doug

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Episode 39: Planning Your Digital Afterlife

SEPTEMBER 25, 2017

This week's episode of Big Picture Retirement is fascinating and so important! Join Devin and John as they talk about[...]

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Episode 38: Protecting Your Assets From Lawsuits and

Other Liabilities

SEPTEMBER 18, 2017

If you've put together a little bit of money, or you have a regular stream of income, it's reasonable to be[...]

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Episode 37: Designating Your Representatives, and Picking Stocks

SEPTEMBER 11, 2017

It's time for the monthly listener questions episode here at Big

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Episode 36: All About Bonds with Dr. Brandon Renfro

SEPTEMBER 3, 2017

When you're investing, it can be hard to tell between "the way it has always been done" vs. what is[...]

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Episode 35: Social Security Is More Than Just Retirement Income

AUGUST 28, 2017

Social Security is an important source of income for older Americans, but it provides many benefits beyond just retirement income. Life[...]

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Episode 34: How To Avoid A Bernie Madoff-Type Scam

AUGUST 21, 2017

There are few things worse than getting involved in a financial scam.

Unfortunately, there are always some people who will[...]

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BIG

Episode 33: Giving IRA Money to Charity, plus Remarriage and Social Security

AUGUST 13, 2017

Once a month, Devin and John answer questions that have been submitted by listeners. This week, Rob asks about[...]

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Episode 32: Why Women Need Better Financial Advice with guest

Russ Thornton

AUGUST 7, 2017

Women often have different financial needs than men, and even more when there has been a change in their marital[...]

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Episode 31: What Veterans Need to Know About Their Benefits

JULY 31, 2017

Many current retirees have a background of military service

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5 Lessons from Market Declines

JULY 28, 2017

In my career as a financial advisor, I've made a few mistakes. The biggest? Not being more convincing to my[...]

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Episode 30: Second Marriages and Blended Finances

JULY 24, 2017

This week's episode is full of useful information and fascinating stories about one of the most complicated family situations: second[...]

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Episode 29: Listener Questions About Inheritance, and Giving Money To Adult Children

JULY 17, 2017

In this month's Listener Questions episode, Devin and John help listeners with questions about disinheriting spouses, and not giving money[...]

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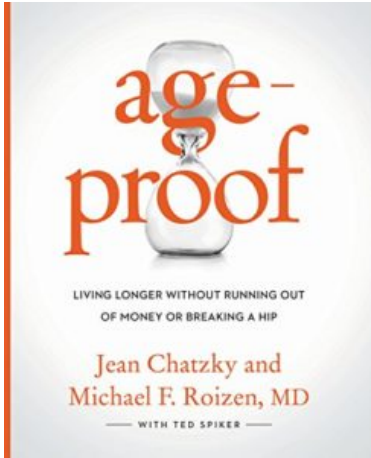


Episode 28: Mid- Year Market

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We are joined again with market guru Andrew Comstock talking about what happened in the markets for the first[...]

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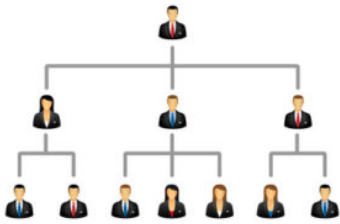


Episode 27: AgeProof – Living Longer Without Running Out of Money or Breaking a Hip

JULY 3, 2017

Today, Devin interviews Jean Chatzky, author of multiple books and the financial editor of NBC's Today show. Her latest book, AgeProof,[...]

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Episode 26: Who You Should Talk To At Your Local Social Security Office

JUNE 25, 2017

This week, Devin and John talk about the best way to get help from your local Social Security office. Unfortunately,[...]

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Death can make everything feel confusing and complicated, even when it is somewhat anticipated. Thankfully, there are some ways[...]

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Listener Questions

Episode 24: Keep the Original Will, and Buy a Rental House or Invest in the Market?

JUNE 12, 2017

It's time again for listener questions! Once a month, Devin and John address the questions sent in by listeners like[...]

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Episode 23: The Problem With Retirement Planning with

Stephen Chen

JUNE 5, 2017

Retirement planning – it can seem overwhelming. It is a little less daunting when you realize that it is just[...]

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MAY 26, 2017

If anyone says that they don't make mistakes, they're probably not telling the truth. Devin and John are no exception![...]

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Episode 21: Naming Beneficiaries

MAY 22, 2017

Who should be the named beneficiaries of the different parts of your estate? It may seem like a simple question,[...]

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Episode 20: Listener Questions—Social Security for Grandkids, and

Reverse Rollovers

MAY 15, 2017

In this week's episode, Devin and John answer reader questions that come in through the email. First, Linda wants to[...]

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Episode 19: Lessons Learned with

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Schools and exams don't teach everything; some things have to be learned through hands-on experience. Today, Devin's guest is Certified[...]

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Episode 18: 9 Social Security Basics That EVERYONE Should

Know-Part 2

MAY 1, 2017

Social Security is a lot easier to understand if you know about 9 basic concepts. In the last episode, we[...]

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Episode 17: 9 Social Security Basics That EVERYONE Should

Know-Part 1

APRIL 24, 2017

Understanding Social Security is much easier if you have a solid grasp of nine basic concepts. Most questions are answered[...]

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Listener Questions

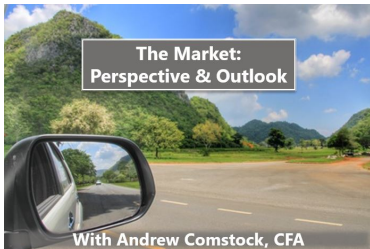
Your Child To Your Accounts

APRIL 16, 2017

In this month's listener question episode, Devin and John talk about the best way to set your child up

to[...]

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Episode 15: The Market-Perspective and Outlook

APRIL 10, 2017

The last part of 2016 was really good for the stock market and the momentum continued for the first[...]

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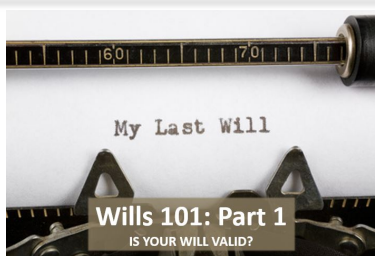
Episode 14: What To Think About BEFORE You Make A Will

APRIL 3, 2017

Last week, we talked about wills: why you need one, and why it needs to be good. This week, Devin[...]

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MARCH 27, 2017

Today's episode is the first part of a two-part series on wills. Devin and John talk about the important difference[...]

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Episode 12: Listener Questions-ABLE Accounts and Power of Attorney

Form for the SSA

MARCH 20, 2017

Devin and John answer a question from Mitch about why the Social Security Office would not recognize his Power of[...]

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Episode 11: Living a Full Life Today While Planning for the Future with

guest Roger Whitney

MARCH 13, 2017

Struggling to find balance between saving for retirement and enjoying life today? You're not alone. It is hard to take[...]

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MARCH 5, 2017

Can you put your hands on important paperwork within a few minutes? Could someone else find this information if they[...]

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Episode 9: How To Hire The Right Attorney

FEBRUARY 26, 2017

You need a lawyer, and there are so many choices! How can you choose? An attorney is a key part[...]

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Listener Questions

Episode 8: Listener's Questions

FEBRUARY 20, 2017

We all know that retirement planning is complicated, and there are a million things that need to be explained. This[...]

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Episode 007: Is Your Financial Advisor a

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Your doctor is obligated to give you the best medical care for you, right? And your lawyer – you expect[...]

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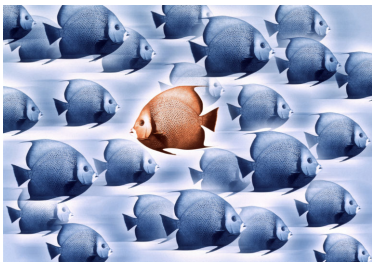


Episode 006: Hiring The Right Financial Advisor

FEBRUARY 6, 2017

A great financial advisor is one of the key planners to help you orchestrate your successful retirement plan. In[...]

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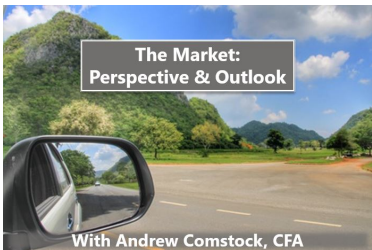


Episode 005: Hiring The Right Tax Advisor

JANUARY 30, 2017

Big picture retirement planning needs to consider tax, financial, legal, and health care considerations. No one can know enough about[...]

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The Markets: Perspective and Outlook

JANUARY 26, 2017

The last part of 2016 was really good for the stock market and the new year didn't stop the momentum.[...]

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Listener Questions

Episode 004: Listener's Questions

JANUARY 23, 2017

In today's mailbag episode we answer a question about the reported "social security gun ban." What's it all about? Is[...]

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Episode 003: Listening to Gurus-With Joe Saul Sehy

JANUARY 16, 2017

What advice should you take from the Gurus? Just because Dave Ramsey knows a lot about paying off debt, should[...]

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Episode 002: Lessons From Jacob & Esau

JANUARY 4, 2017

Both Devin and John like to go out and talk to groups. One of John's most popular presentations is about[...]

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A successful retirement means that you have to look at everything. Your financial, tax, healthcare & legal plans have to[...]

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Episode 000: Welcome to The Big Picture Retirement Show

JANUARY 4, 2017

Welcome to the Big Picture Retirement Show! This show is designed for anyone who is planning for, or living in,[...]

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