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June 6, 2019

The Story of Jane (https://retiresmarter.podbean.com/e/the-story-of-jane/)

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Jane is in her mid 60s. She recently inherited money from her father and is soon to be getting remarried. She had two advisors – her own and now dad's advisor – but didn't have the clarity and confidence she felt she needed around her money and these big life transitions. Listen to Kevin share her story as she considered what she really wanted from a relationship with an advisor and wrestled with whether she had the type of financial situation to justify paying an advisor for help.

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May 16, 2019

Are Guarantees Worth It? Retirement Income Planning Series Part 5 (https://retiresmarter.podbean.com/e/are-guarantees-worth-it-retirement-income-planning-series-part-5/)

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When choosing investment vehicles, for many people the most important factor is the guarantee that they'll receive a certain amount of income across their lifetime. But what exactly will that guarantee cost you? We'll find out on the fifth and final episode in the Retirement Income Planning Series.

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May 2, 2019

Dynamic Strategy: Retirement Income Planning Series Part 4 (https://retiresmarter.podbean.com/e/dynamic-strategy-retirement-income-planning-series-part-4/)

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When building a financial plan that's based around investing, it's important to take into account a handful of dynamic elements that will likely vary quite a bit throughout your retirement. Tune in to our fourth installment of the series to hear how you can organize your plan around dynamic market expectations, dynamic allocations, and dynamic spending.

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April 18, 2019

Total Return Portfolio: Retirement Income Planning Series Part 3 (https://retiresmarter.podbean.com/e/total-return-portfolio-retirement-income-planning-series-part-3/)

(https://retiresmarter.podbean.com/e/total-return-portfolio-retirement-income-planning-series-part-3/)

If you're taking a probability-based approach to investing as we discussed in the first part of this series, you'll need to build a strategy for how to most efficiently invest your savings to provide an income throughout retirement. That's where the Total Return Portfolio comes into play.

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April 4, 2019

Bad-Timing Risk: Retirement Income Planning Series Part 2 (https://retiresmarter.podbean.com/e/bad-timing-risk-retirement-income-planning-series-part-2/)

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We continue on with the series by discussing a lesser known type of risk called bad-timing risk. What happens when you retire into a bad period in the market? How can a few years of negative returns affect the outcome of your retirement?

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Retirement Income Planning Series - Part 1 (https://retiresmarter.podbean.com/e/retirement-income-planning-series-part-1/)

(https://retiresmarter.podbean.com/e/retirement-income-planning-series-part-1/)

For many people, one of the biggest fears going into retirement is where money will come from when you're no longer receiving a paycheck. That's why creating a retirement income plan is so essential. Join us as we go over the basic strategies for building a retirement income plan on this first episode of the new series.

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March 7, 2019

Episode #15: Integrated Advice Is Better Advice (https://retiresmarter.podbean.com/e/episode-15-integrated-advice-is-better-advice/)

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When it comes to building a holistic retirement plan, all of the individual pieces should be working together harmoniously, whether that's planning, investing, or taxes. Let's talk about why integrated advice is often hard to come by, and why it's crucial to building a successful retirement plan.

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February 21, 2019

Episode #14: Long-Term Return Expectations (https://retiresmarter.podbean.com/e/episode-14-long-term-return-expectations/)

(https://retiresmarter.podbean.com/e/e 14-long-term-return-expectations/)

You've likely heard that making short-term predictions about the market is just about impossible, but what about long-term predictions? Can experts accurately anticipate what will happen over the next 10 years? Kevin discusses a recent Morningstar article by Christine Benz about what you can take away from long-term stock and bond return predictions.

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February 7, 2019

Episode #13: Beating Up On Variable Annuities (https://retiresmarter.podbean.com/e/episode-13-beating-up-on-variable-annuities/)

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If you listened to Episode #12, you heard the rundown on just about every type of annuity except the variable annuity. So what exactly is involved in a variable annuity, and why is it almost like a four-letter word to so many in the retirement community? Kevin will give you the details on what these annuities do, what you should look out for, and if there ever truly is a reason you would want to invest in one.

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January 17, 2019

Episode #12: Behind The Curtain Of Annuities And Free Steak Dinners (https://retiresmarter.podbean.com/e/episode-12-behind-the-curtain-of-annuities-and-free-steak-dinners/)

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Have you ever received an invitation to attend a steak dinner seminar event to learn about a financial product? Were you pitched an annuity? This is a popular phenomenon in the financial advising world and it's one that drives Kevin a little crazy. Join us on this episode as we take a peek behind the curtain and talk about what's really happening at these free steak dinners.

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