

2025

RETIREMENT

BOOTCAMP



MARCH 15, 2025

KEY DISCUSSION POINTS



Retirement Income Planning

- Protection from market volatility
- Minimize risk to maximize retirement income
- Importance of a written plan



Tax Strategies

- Be proactive, not reactive
- Is your money Empowering your Life?



Estate Planning

- Four things every estate plan must cover
- What is a trust and when should I have one?
- How to create a plan that minimizes family conflict



Medicare Planning

- The Medicare maze - what, when, and where do I begin?
- Basics of medicare and supplemental insurance plan types

FEATURED PRESENTERS



Tom Jacobs,
Retirement Income
Planning



Amanda Williams,
Tax Strategies



Shawn Eyestone,
Estate Planning



Lauri Veneman,
Medicare Education

SIGN UP NOW!



rsvp.org/bootcamp



616-622-4654

This event is being hosted free of charge
and will include a complimentary lunch

WHEN AND WHERE?



Saturday, March 15th



9:00am - 2pm



Watermark Country Club
1600 Galbraith Ave. SE
Grand Rapids, MI 49546