

# Financial Planning Supermarket

A shift in how individuals and families are making  
personal financial decisions

ABC Investments, Inc.  
STOCK • BONDS • RETIREMENT

WORRIED ABOUT YOUR RETIREMENT  
INQUIRE WITHIN





285,000

Financial Advisors



80,000

Financial Planners

Our transparent pricing and low commissions can help you trade and invest for less.

## Online Trades

Platform Fees

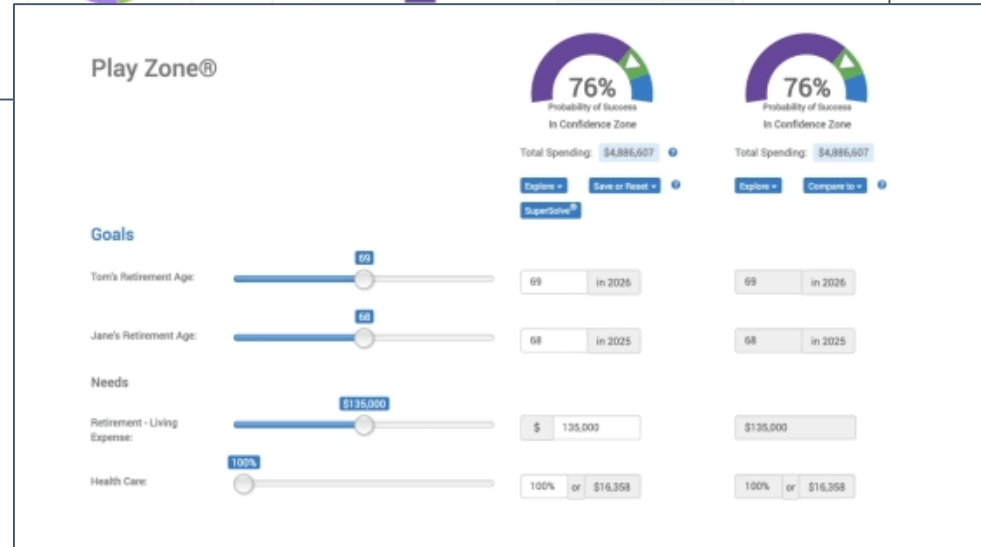
Account  
Maintenance Fees

Account Opening Fees

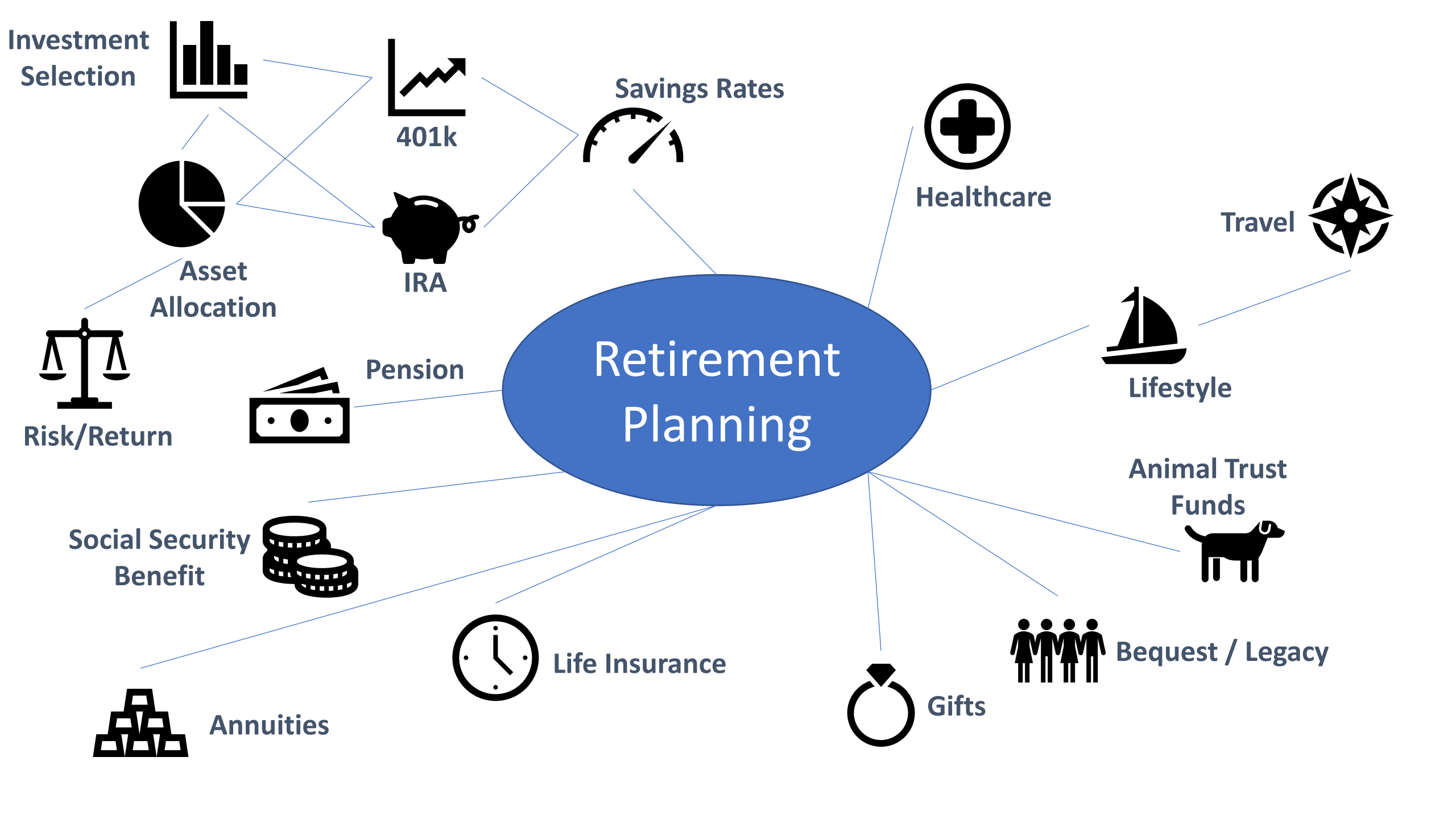
[Learn more >](#)

This is not an offer or solicitation in any jurisdiction where it is applicable law or regulation. You are retail value. The value of this credit is not an offer. Please consult your advisor. Please consult your advisor. U.S. tax code and for relevant state recommendation or investment as

## A man in a dark suit and a headset is seen from the side, looking at several computer monitors. The monitors display various financial data, including bar charts, line graphs, and tables of numbers. The scene is set in a professional office environment, likely a trading floor or financial analysis department.



# Personal Financial Goals



Invest /  
Save

Products		
Mutual Funds / ETFs	SMAs	Alts
Individual Securities	Bonds	REITs
Deposits		

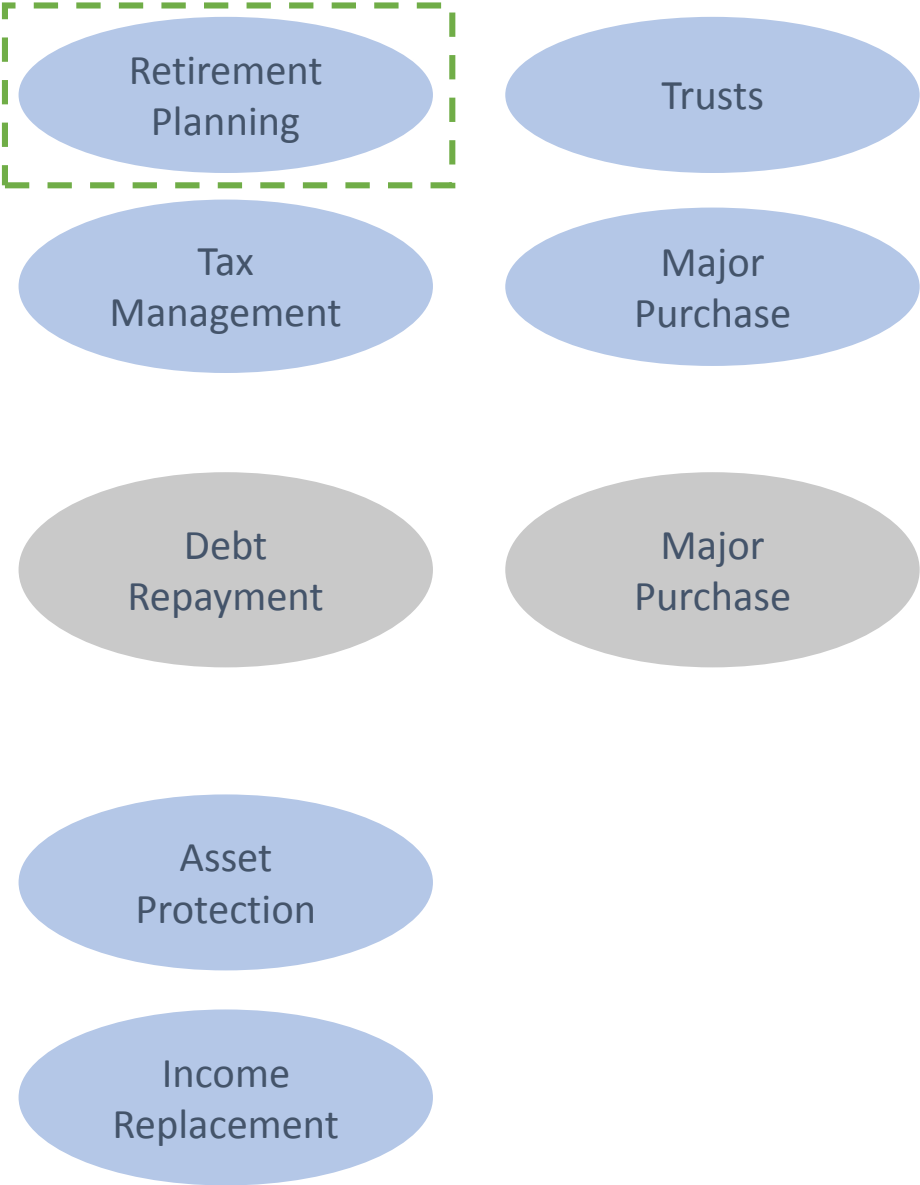
Loans

Mortgage	Consumer Loan
Student Loan	Cards

Insure

Life	Annuities	Medical / Dental
Long-Term Care	Pet Insurance	
Disability	Umbrella	Personal Property
Policy Riders	Travel Policy	Event Insurance

Advisory Services





## For what type of Insurance Goals would YOUR individual/family clients be solving?

 When poll is active, respond at **PollEv.com/act4agents**  Text **ACT4AGENTS** to **22333** once to join

 Answers to this poll are anonymous



# Resources

### Basic Finances

Learn the basics of personal finances with helpful articles and videos.

[Go to Basic Finances >](#)

### Credit Management

Learn how to build and maintain your credit plus use credit responsibly.

[Explore Credit Management >](#)

### Education Finances

Tips on paying for college and managing your money in school.

[Go to Education Finances >](#)

### Homeownership

Get tips on buying and maintaining your home.

[Explore Homeownership >](#)

### Investing

Learn how investing may help you meet your financial goals.

[Get Started Investing >](#)

### Retirement

Discover strategies to plan and live in retirement

[Explore Retirement >](#)

### Insurance and Protection

Explore how to insure what matters.

[Go to Insurance and Protection >](#)

### Small Business

Explore helpful tips and resources for entrepreneurs.

[Go to Small Business >](#)

### Test Your Knowledge

Take our short quiz to test your knowledge about personal finances

[Take the Quiz](#)

**Investment and Insurance Products:**

- **Are Not insured by the FDIC or any other federal government agency**
- **Are Not deposits of or guaranteed by a Bank**

VS

# Tools


What are your Expectations for retirement? What are your Concerns?


2 of 2


MoneyGuidePro™


Select Expectations


Identify Concerns


Active Lifestyle





Quiet Lifestyle





Opportunity to Help Others





Work by Choice





Time to Travel





Time with Friends & Family









Less Stress - Peace of Mind



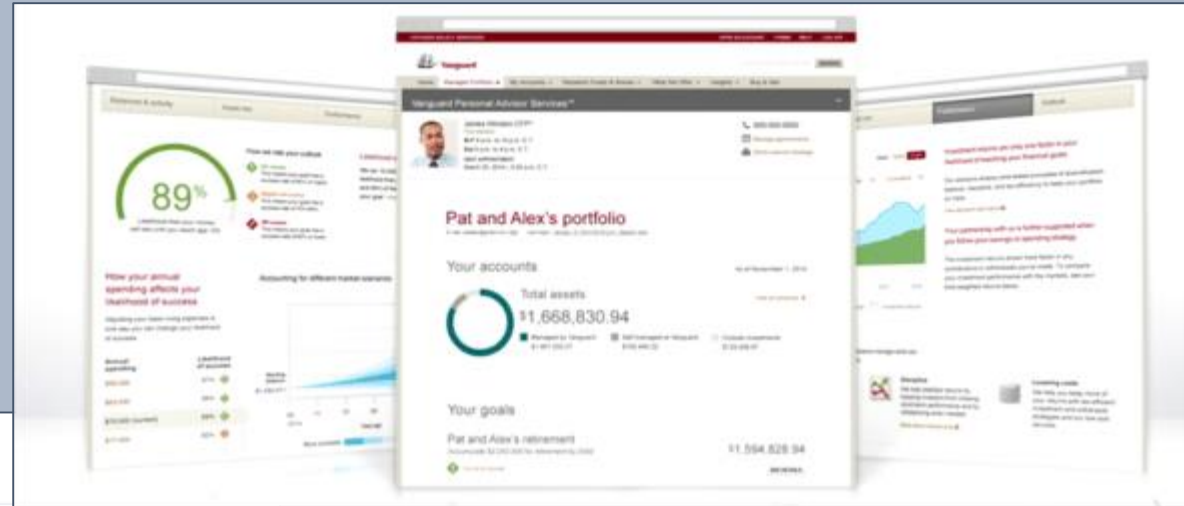
Start a rock band



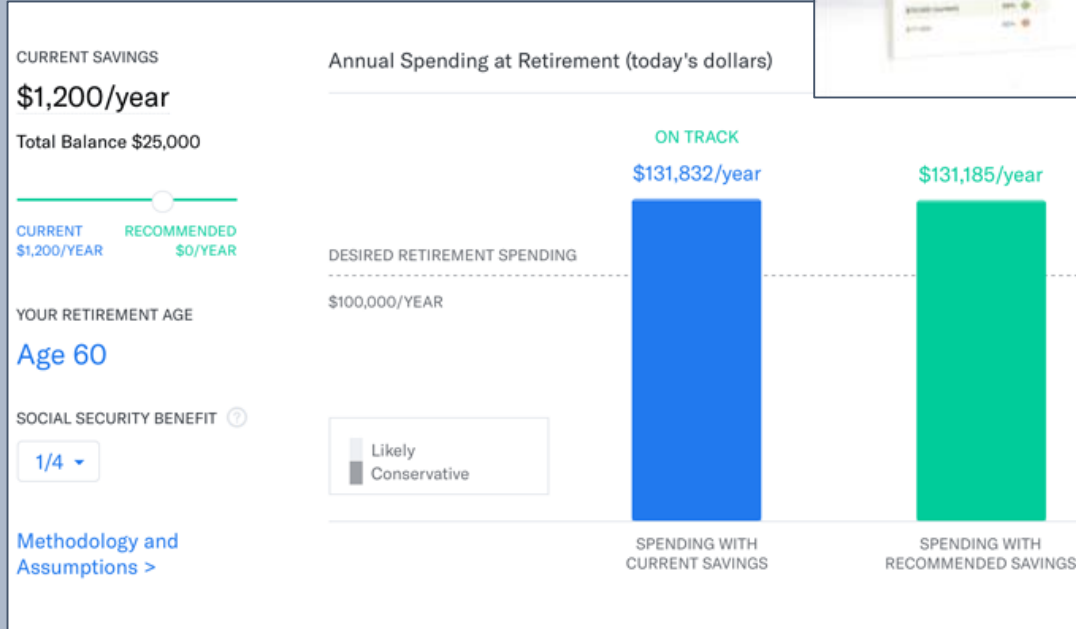
Your Concerns	How your plan can Help
Level of concern: High	
 Running out of money	Create a plan together that won't run out of money even if "bad things happen".
 Living too long	We'll test your plan to see if it can survive as long as you do, even if you live to 100.
 Parents needing care	We'll include a Goal for the cost of care for your parents.
Level of concern: Medium	
 Suffering Investment Losses	Find the portfolio that best balances risk & reward.
 Leaving a Legacy & potential Estate taxes	Your plan can include bequests and tax-reduction strategies.
 Too much time together	Planning retirement together is a great way to identify shared opportunities and avoid conflicts.



# Vanguard Personal Advisor Services



## Betterment



## Schwab Intelligent Portfolios



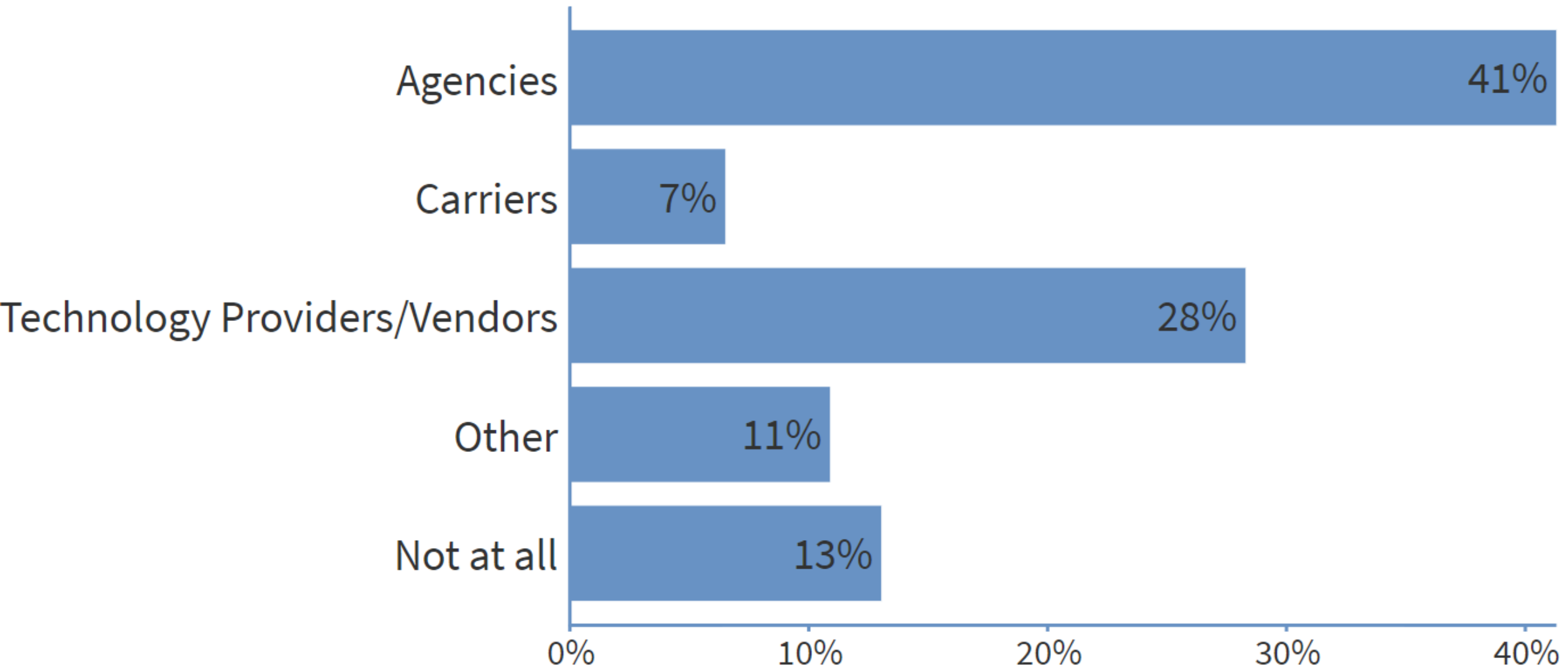




# Where do you see financial planning trends impacting P&C insurance?

 When poll is active, respond at **PollEv.com/act4agents**  Text **ACT4AGENTS** to **22333** once to join

 Answers to this poll are anonymous





# Client Outcome Focused



✓ What are your Expectations for retirement? What are your Concerns? 2 of 2

MoneyGuidePro™

Select Expectations Identify Concerns

Your Concerns		How your plan can Help
Level of concern: High		
Running out of money		Create a plan together that won't run out of money even if "bad things happen".
Living too long		We'll test your plan to see if it can survive as long as you do, even if you live to 100.
Parents needing care		We'll include a Goal for the cost of care for your parents.
Level of concern: Medium		
Suffering Investment Losses		Find the portfolio that best balances risk & reward.
Leaving a Legacy & potential Estate taxes		Your plan can include bequests and tax-reduction strategies.
Too much time together		Planning retirement together is a great way to identify shared opportunities and

VS

# Product Focused

