

Use Short Action Plan

The focus is:

Liquidity

- Checking
- Savings
- Cash Value Life Insurance

Protection

- Term Policy with Living Benefits
- Disability Insurance

Retirement

- Matched 401(K)
- Roth

**Age
25**

**Protection
against lost
income**

**Age
65**

**Protection
against lost
assets**

**Age
90**

Use of Long Action Plan

The Focus is:

Income

- Annuities
- Pensions

Protection

- Long Term Care
- Living Benefits

Accumulation (Short)

Distribution (Long)

**Age
25**

**Age
90**