

RETIREMENT STRATEGY ANALYSIS



LEVEL FOUR
Financial
A DIVISION OF
LEVEL FOUR GROUP, LLC

Household Name: _____

Date: _____

CURRENT STRATEGY

Annual Retirement Living Expense	
Targeted Retirement Age	
Portfolio Blend	
Life Changing Financial Goals	
Likelihood of Success	

OBSERVATIONS

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RECOMMENDED STRATEGY

Annual Retirement Living Expense	
Targeted Retirement Age	
Portfolio Blend	
Life Changing Financial Goals	
Likelihood of Success	

IMPACT OF ADVICE

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866.834.1040 | WWW.LEVELFOURFINANCIAL.COM

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