You've been waiting for this time. This far off life event called "retirement" is almost here.

Now the concept is about to become a reality. Are you really ready for all that retirement entails?

WH Cornerstone Investments provides you a series of meetings, exercises and follow-up coaching sessions to give you a clear roadmap for your retirement. If you're in a relationship, you'll go through this program together.

The ultimate goal of your money is to live your best life possible in your second-act. Together, we can help you achieve that.

Let's walk through the details of how this service works and what you can expect.

Begin it.™

WH Cornerstone Investments

WWW.WHCORNERSTONE.COM

Getting a baseline of your values and visioning for the future

Our First Meeting

The first meeting will focus on getting a base line of your values through a few different tools.

Personal Values Assessment (PVA)
Your values reflect what is important to you. They are a shorthand way of describing your motivations. Together with your beliefs, they are the causal factors that drive your decision-making.

Find out what is important to you by taking a five-minute assessment in advance of the meeting. Who you are, what you hold dear, what upsets you, and what underlies your decisions, are all connected to your personal values.

Wheel of Life
The eight sections on the Wheel of Life represent different aspects of your life. You will rank your level of satisfaction with each life area and discuss.

What's your Return on Life?
You have saved a pool of money. Is it serving you or visa versa? This tool will help you discover your life satisfaction in 10 areas and how well you are using your money to live your best life possible.

Your Life Legacy Conversation
You will review a series of cards, choose one and talk about why it's important to you, your family, and/or the broader world.

Our Second Meeting

The second meeting will be a discussion through the following areas:

- ☐ **My Retirement Observations**
  Discuss your experiences of other's retirement - who has done it well and who hasn't.
- ☐ **Retirement Visioning-**You'll get to envision where you'll be spending your time during retirement.
- ☐ **Spending Your Time-** Let's dream! What's your ideal week in retirement look like? Design it.
- ☐ **My Retirement Worksheet-** Discover what's most important to you.
- ☐ **My Retirementality Profile-**Decide what is most like and least like you.

Post-Meeting Check-ins

For up-to three months following our meet-ings, we'll be available for spot-coaching and to answer any questions as you navigate your new normal.

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