



Your Complete Retirement Planning Road Map: A Comprehensive Action Plan for Securing IRAs, 401(k)s, and Other Retirement Plans for Yourself and Your Family

Ed Slott

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This is the same diagnostic system I use with my own clients and with the financial advisors I train. So, going through it will be like having me sitting beside you, whispering in your ear, guiding you every step of the way.”

—from Your Complete Retirement Planning Road Map

Corporate pensions are disappearing. Social Security is in trouble. And the sizable postwar generation is reaching retirement age. With the futures of millions of Americans at stake, Ed Slott, the country’s foremost retirement planning advisor, now offers expert advice on weathering the perfect storm of financial instability that looms on the horizon. Your Complete Retirement Planning Road Map, Slott’s most essential and accessible book yet, provides clear step-by-step directions through the highways and byways of IRAs, 401(k)s, 403(b)s, and other major accounts.

In five helpfully focused sections, Slott combines crucial facts with interactive checklists and questionnaires (those he uses with his own clients) to teach investors and beneficiaries alike the best way to save and to maximize an inheritance. Inside you’ll discover

- **My Account Inventory:** an overview of every retirement savings account you own, whether you’re thirty or sixty-five—from what it is and where it is to who gets it and how, plus where to put important data for easy access and where to store your essential documents (hint: not in a safe-deposit box)
- **The Account Owner’s Care Solution:** how to properly fill out retirement account beneficiary forms so that whatever amount of money is left in your account after you’ve fully enjoyed retirement will go to whomever you choose and not to relatives who suddenly pop up out of nowhere
- **The Account Beneficiary’s Care Solution:** what to do when you inherit so that you won’t lose any of the tax benefits and other opportunities your benefactor has created for you, or make a mistake that could wipe out an inherited fortune that took years to build up
- **The Special Issues Care Solution:** how to handle the out-of-the-box issues that could affect you or your beneficiaries (e.g., life events such as divorce or incapacity; tax issues for unmarried partners; decisions about trusts)
- **The Follow-up Care Solution:** how to keep your planning on track and make adjustments when circumstances change, and how to determine whether your professional retirement advisor is really up to the task of preserving and protecting your money
- **Plus:** the most up-to-date information on tax laws, including the Pension Protection Act of 2006, which provides major new retirement incentives that you can take advantage of

Your Complete Retirement Planning Road Map is an indispensable planning solution that is sure to become the standard how-to on a complex subject that is becoming relevant to more people every day.

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Florinda Redfern:

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