

How the *LifePlanning* Process Works

How will you build your LifePlan using the Comprehensive Retirement Planning Series?

Each *LifePlanning* Pillar is represented by a lesson in the Comprehensive Retirement Planning Series. The lessons include the Introduction, Health, Housing, Financial, Legal, Family, and My LifePlan Blueprint. Each lesson includes multiple topics that address the goals or principles of a *LifePlanning* Pillar. In each lesson, you will encounter the following types of content:

Goals: These are the essential objectives of each Pillar. These items are critical to securely navigate your retirement. In order to see your progress toward each *LifePlanning* goal, we will track and display your progress as you mark content as completed.

Options: We will review A LOT of information within each goal about the options available to you.

Decisions: These are the personalized choices you will make to achieve the goals in your personalized *LifePlan*. Most lessons contain worksheets that will help you decide which option is best for your circumstances and preferences.

Tasks: These are your *To-Do* items that you'll need to complete based on your decisions.

Selection of the professional providers you need to support/fulfill your decisions. The work you do with your selected providers is how you will implement your plan.

Success Tips

- Using the course navigation menu on the right, click on each lesson to see the list of topics in that lesson.
- Lessons and topics build on previous content, so it is best to take them in the order presented.
- As you finish a lesson or topic, mark it as “Completed” to track your progress through the course.