

THE JKA REPORT

AN INVESTMENT NEWSLETTER FOR CLIENTS & PROSPECTS



“Retirement is not the end of the road:
it is the beginning of the open highway.”
-Unknown

“If it is important to you,
you will find a way.
If it is not,
you will find an excuse.”
-Unknown

“ Slow down,
savor the moment,
and let joy
be your daily routine.”
-Unknown

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Goal Planning & Monitoring

*Financial planning software designed to put
you on the path to realize your goals*

**Goal Planning & Monitoring is designed to put you
in control of your future. Along with the financial
advisors at Jerry K. Ask Investment Services,
you can develop a plan that will help you visualize
your future so you can enjoy the wealth
you've worked hard to build.**

Together, you and your advisor can create a customized goal plan, test adjustments in real time and predict your retirement readiness - making sure you're in the "green zone."

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Steps to creating your plan and getting results:

1. Goal Creation

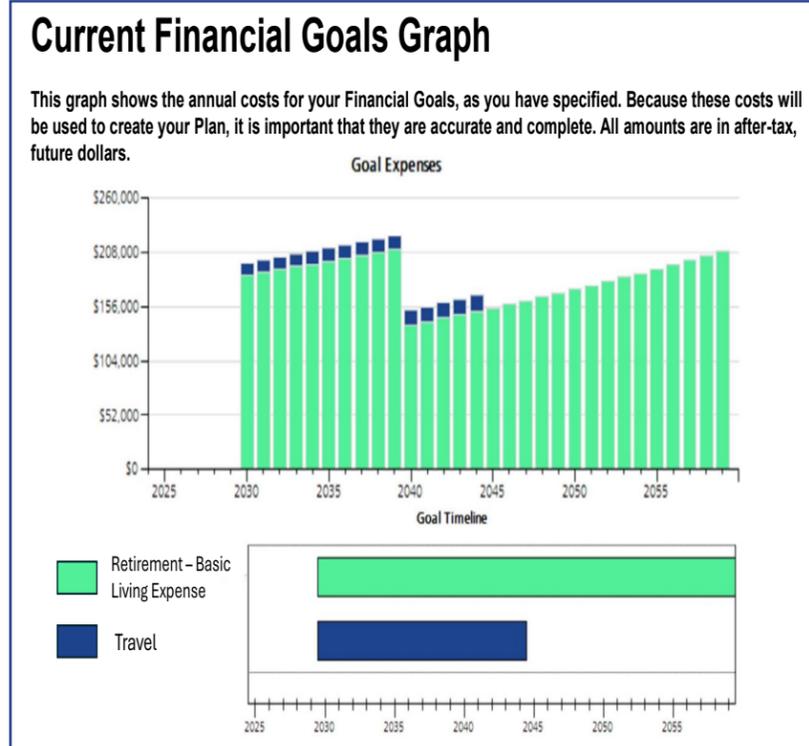
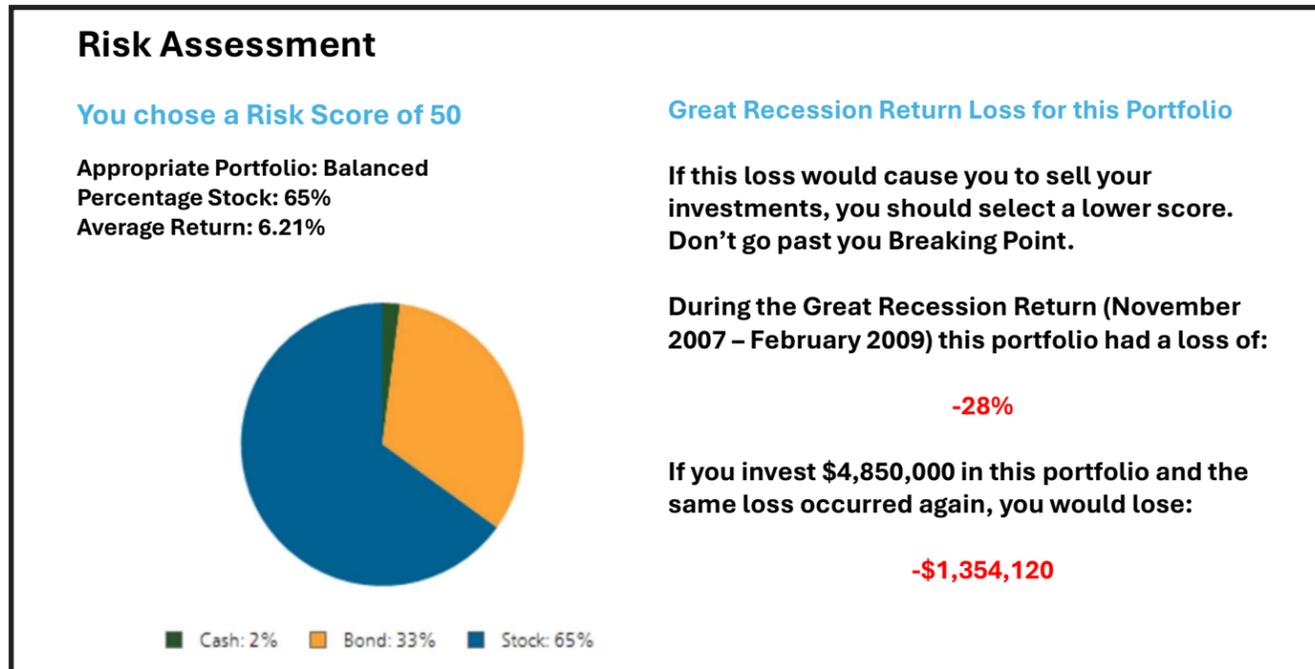
The planning process starts with a question: What does your ideal retirement look like? Allow yourself to dream a little. Think of how much you would like to spend on things such as travel, charity, home improvements or even a new car.

2. Identify Resources

You'll get a better understanding of your overall financial picture with the ability to view your income and assets - the foundation of your plan and the key to achieving your goals - in one place. Navigating complex resources such as Social Security Analysis.

3. You and the Market

Understanding how the markets work and your comfort with taking risk is the key to a successful plan. Your advisor can use the software to help you understand your tolerance for risk, explaining market cycles and helping you identify scenarios that might cause you to rethink your long-term investment strategy.



Using interactive features like PlayZone® and What Are you Afraid Of?®, you can instantly see how changes, small or large, impact the success of your plan and stress-test your choices to help you feel confident that, even through changes, you'll stay on track.

Once you and your advisor have worked together to create your plan, you can use Goal Planning & Monitoring regularly to check your progress. Ask your advisor how you can easily keep up with your plan.

4. Getting Results

The main goal of your plan is to get you into the “confidence zone” or “green zone,” the optimal financial position for achieving your goals, and to keep you there over time.

