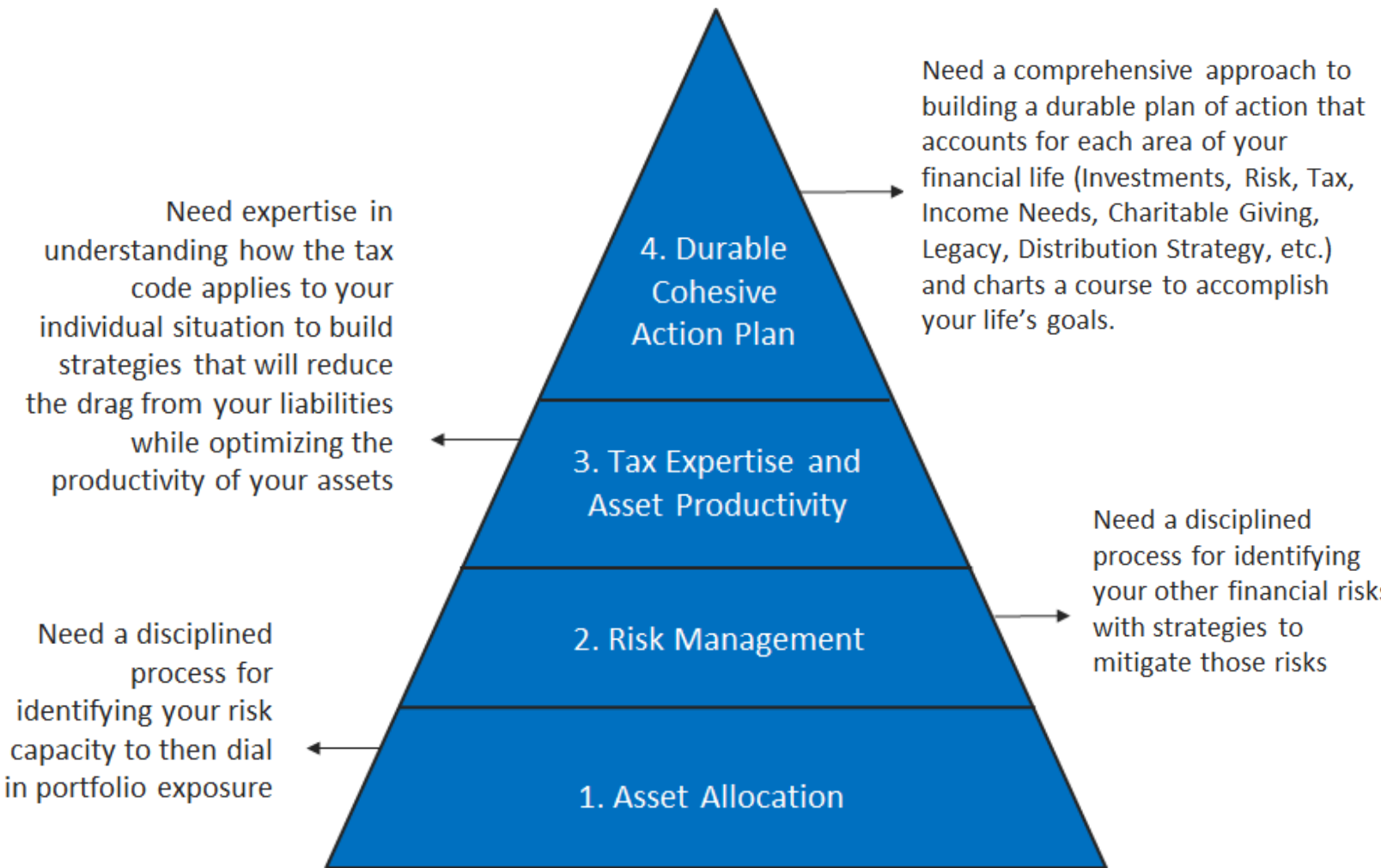


# SECOND ACT PLANNING PARTICIPANT MATERIALS

Workbook



**THE CHALLENGES IN CREATING A DURABLE COHESIVE PLAN WITH SILOED FINANCIAL SERVICES**



# COURSE 2: PART ONE

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*True enjoyment comes from activity of the mind and exercise of the body.*

*The two are ever united.*

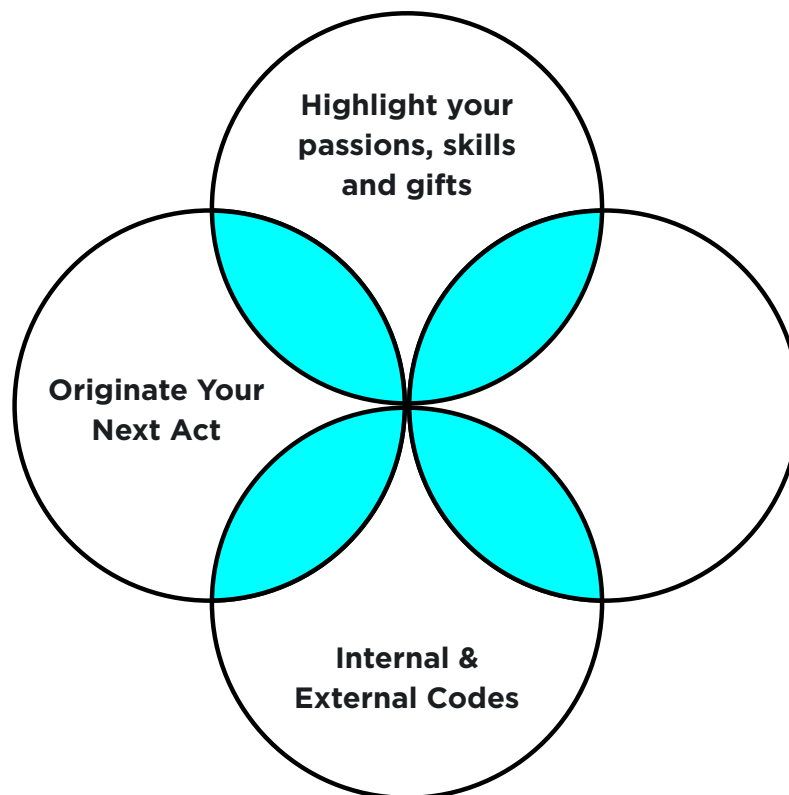
— *Karl Wilhelm Von Humboldt, German Philosopher*

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## Engaging Your Mind and Body

This is one of four courses intended to help you take ownership of your next Act to build the life you can be inspired to live.

The other courses are:



# THE PIES MODEL

*The 8 equities: physical, spiritual, psychological, intellectual, emotional, financial, social and family. —Michael Vance, Alethan*

## Physical (examples)

- walk
- run a 5k
- take a spin class
- play guitar
- kayak
- joggle
- golf Frisbee
- biking
- hiking
- trails
- jump rope
- yoga
- hula-hoop

## Intellectual (examples)

- crossword puzzle
- new hobby
- draw
- paint
- ask why
- hang out with a child
- science
- thinking hats technique
- observation
- change environment
- create
- daydream

## Emotional (examples)

- reduce anxiety
- breathe
- meditate
- small wins
- sleep
- say no
- new friends
- practice gratitude
- find purpose
- counseling
- laugh

## Social | Spiritual | Service (examples)

- linked in
- larger community
- help a neighbor
- worldviews
- visit churches
- read
- solitude
- donate blood
- feed the hungry
- donate your stuff
- NFP / website

# 30 DAY CHALLENGES

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*The 30-day challenge is a fast focused way to make real changes in your life. —Inkandvolt.cm*

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## 30 day challenge template

What: \_\_\_\_\_

Why: \_\_\_\_\_

Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Day 8	Day 9	Day 10	Day 11	Day 12	Day 13	Day 14
Day 15	Day 16	Day 17	Day 18	Day 19	Day 20	Day 21
Day 22	Day 23	Day 24	Day 25	Day 26	Day 27	Day 28
Day 29	Day 30	Day 31				



## Overview

The goal of the Durable Cohesive Plan of Action

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The challenges to building a Durable Cohesive Plan of Action

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Bucket 1

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Bucket 2

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Bucket 3

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Why it matters

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## Social Security Notes

The primary role of Social Security

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Three levels of taxation of Social Security

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Reasons to delay filing for Social Security

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Family Benefits: Spouse / Ex-Spouse / Survivor

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General Rule of Thumb

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Additional Notes on Social Security:

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## Medicare Notes

Part A

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Part B

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Part C

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Part D

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Eligibility

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Additional Medicare Note:

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## **Jim Richter, CFP(R), CAIA(R), EA**

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Jim sets the strategic direction for the firm, including oversight of all tax and financial planning services at Monotelo Advisors. He brings 20+ years of experience in the financial services industry, including 10 years of hedge-fund specific work across diverse investment products. Prior to founding Monotelo Advisors, Jim spent 7 years as a Managing Director and Partner at PT Asset Management. Prior to his time in the asset management industry, Jim spent 9 years as a fixed-income specialist in the banking industry. Jim is a CERTIFIED FINANCIAL PLANNER(TM) practitioner and Chartered Alternative Investment Analyst with a degree in Finance from the University of Illinois - Chicago.

Jim is an Enrolled Agent, a federally authorized tax practitioner empowered by the US Department of the Treasury to represent taxpayers before the Internal Revenue Service.



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I am a diplomatic and driven strategic leader who is also a prudent change-agent and collaborator. I coach and facilitate to take organizations to their next stage of development.

Others see me as a trusted partner with an approachable inclusive style as well as strong leadership presence, managerial courage, creativity, and high energy which has been demonstrated in for-profit, not-for-profit, academic, family-owned, and municipal organizations.