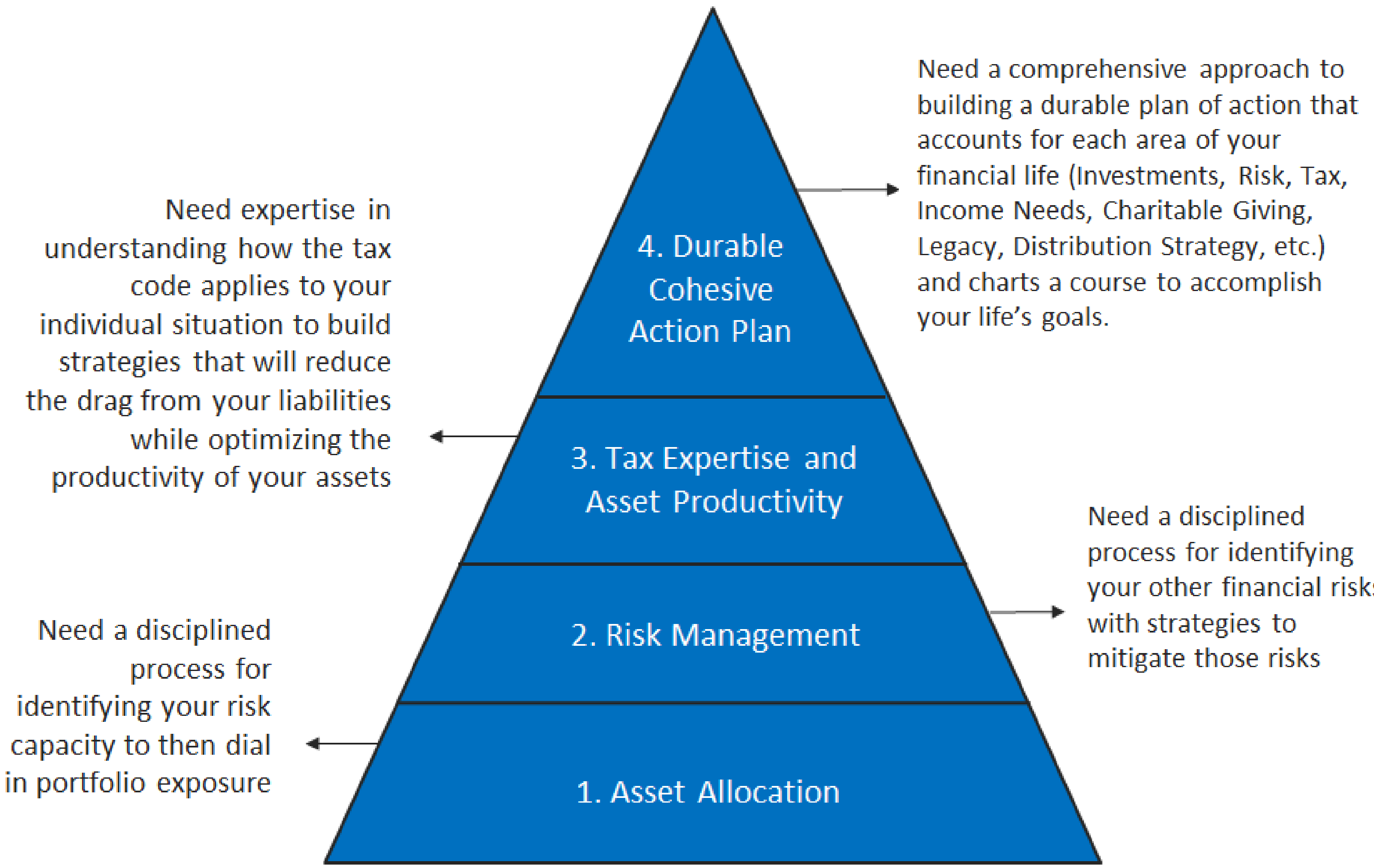
SECOND ACT PLANNING PARTICIPANT MATERIALS

Workbook

RETIRE-READY

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



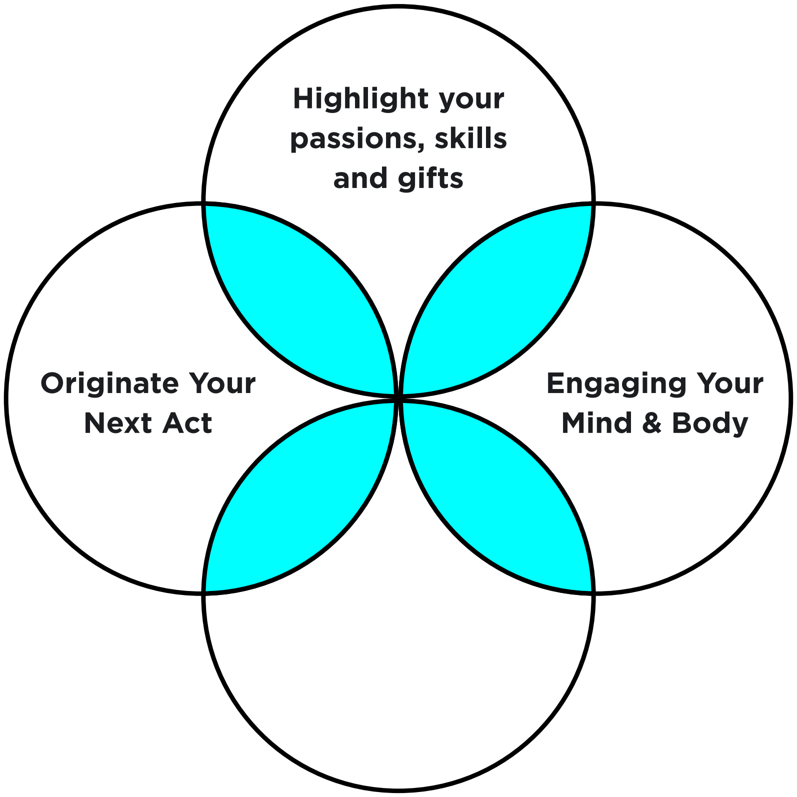
COURSE 3: PART ONE

Retirement is a time for personal growth which becomes the path to greater freedom.
— Author Unknown

Reflecting on Internal | External Codes

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:



Relationships | Engagement

Self:

Family:

Young People:

Similar Demographic Group:

Different Demographic Group:

Community Society:

NOTES

Retirement is not the end of the road; it is the beginning of the open highway.
—Author Unknown

What do you want to remember from this session?

Estate Planning

The Durable Cohesive Plan of Action

Determinants of estate planning needs

Most common mistakes in estate planning

Primary goals of estate planning

The three levels of estate planning

Advantages and disadvantages of probate

Requirements for a valid will

Will substitutes

Primary purposes of a trust

Tax-Efficient Retirement Planning

Notes on charitable giving

Notes on asset location

Notes on bracket management

401(k) Plan notes

The end of the Tax Cuts and Jobs Act

Tax-Efficient Retirement Planning notes

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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.