

Boeing Employee

Retirement



Retirement is much like building an airplane. It takes exceptional planning and execution. Without these crucial steps, your retirement assets can crash and perhaps never recover. These **Five Key Areas** are designed to help you avoid the costly mistakes others have made during their retirement years.

1

MAXIMIZE YOUR BOEING PENSION

Pensions are a KEY part of your retirement. You ONLY get one chance to make the right decision. Choosing the right option can make a huge difference for both you and a spouse. **Pension Maximization strategies are the solution.**

2

PROTECT YOUR BOEING VIP ACCOUNT

HOW TO AVOID RETIREMENT MISTAKES. With the market going up and down, having both SAFE and RISK Growth can give you the ability to survive and even negative through these difficult times. **Avoid a Sequence of Returns dilemma!**

3

BUILD A RETIREMENT PLAN THAT WORKS

Planning mistakes are costly. Airplanes, much like Retirement, require a solid blueprint executed with excellence. Strategies are essential for Taxes, Market Risk, and unseen Medical expenses. **IF YOU FAIL TO PLAN, YOU PLAN TO FAIL.**

4

MINIMIZE TAXES IN RETIREMENT

DOES YOUR CPA GIVE YOU ADVICE? Implementing a solid tax strategy allows you to build a distribution method for your assets that may save thousands of dollars over your lifetime. **A customized TAX MAP education is priceless!!!**

5

Long-Term Care / Asset Protection

Over 70% of those in retirement will incur Long-Term Care expenses. A proper strategy of leverage can protect much of your assets from being depleted. Learn how to leverage your assets to cover these expenses without going broke.



Corbin Lindsey
Financial Advisor

Welcome to Birdseye Financial

We help individuals, families, and businesses plan for a secure future through education and cutting edge financial strategies. We believe that no two individuals or businesses are alike and for this reason, we are dedicated to giving our clients the personal attention they deserve. Our financial solutions are as unique as our clients.

Birdseye Financial offers a full range of financial products and services. We believe that tax planning strategies, retirement income planning, and estate conservation should be top priorities for individuals and families of all ages and income levels. Because many people regard financial strategies as complex and confusing, they often miss out on many financial strategies that exist for them. They also tend to take unnecessary risks and fail to adequately protect their assets.

Birdseye Financial specializes in estate planning for all sizes of estates, large and small. We help clients look at different methods to help reduce or eliminate unnecessary taxes such as income taxes, social security taxes, and estate taxes. In addition, we help clients avoid probate, increase spendable income, and protect against Medicaid spend-down of assets when Long-Term Care is needed. We help our clients in all areas of importance.

WHERE WE SPECIALIZE

- ◆ Fixed Index Annuities
- ◆ Safe Money Options
- ◆ Risk Money Management
- ◆ Medicare and Long-Term Care
- ◆ Final Expense

WHAT WE DO

- ◆ Retirement Planning
- ◆ Income Planning
- ◆ Pension Max
- ◆ Social Security Max
- ◆ Risk Assessment
- ◆ Tax Strategies
- ◆ Estate Planning
- ◆ Asset Protection
- ◆ Wealth Transfer
- ◆ Charitable Remainder Trust