



# Retirement & Investment CENTER

Your Personalized Path to a Confident Retirement



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# Welcome

## FROM YOUR ADVISOR



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**Welcome to the Retirement & Investment Center!  
Whether you are beginning to plan or already in  
retirement, our Center is here to guide you.**

I am Brent Weisenborn, your fiduciary advisor through Fiduciary Trust Private Wealth Counsel LLC in partnership with TelComm Credit Union. My mission is to help you navigate retirement with clarity and confidence—backed by personalized planning and not "one-size-fits-all" solutions.

**Let's get started.**

# About the Retirement & Investment Center



*From birth to end of life, TelComm is here for your financial journey.*

Planning for retirement should not be overwhelming or "one-size-fits-all." The Retirement & Investment Center exists to give you personalized guidance on:

- ✓ **Income you can count on**
- ✓ **Lifestyle goals worth anticipating**
- ✓ **Easily manageable health care**
- ✓ **A legacy which reflects your values**

Our Center also hosts Retirement & Investment Academy events—90-minute interactive seated workshops designed to help you retire smarter. These sessions offer tools, insights, and no-pressure learning opportunities to build your confidence.

# Who Would Benefit the Most from the R & I Center?

The Center is designed for individuals who:

- ✓ Are 55+ and thinking seriously about retirement
- ✓ Want clarity on Social Security, Medicare, or Required Minimum Distributions (RMD)
- ✓ Have multiple retirement accounts and want to simplify
- ✓ Want to protect their legacy and make smart money choices
- ✓ Seek peace of mind knowing they are working with a fiduciary



# Insights for Your Retirement Journey



*Your portfolio should reflect your goals, not someone else's.*

A successful retirement strategy blends predictable income with personal priorities. Here are some guiding principles we will walk through together:



## Mindset

Retirement is not the end—it is a new chapter.



## Money

Build your own paycheck with Social Security, pensions, IRAs, and more.



## Health

Plan ahead for Medicare and long-term care.



## Lifestyle

Create room for travel, hobbies, volunteering, and rest.



## Legacy

Ensure your estate plan reflects your wishes.

# 10 Guiding Principles to Retirement

1. Know your retirement budget.
2. Maximize Social Security wisely.
3. Do not outlive your money.
4. Invest with purpose, not guesswork.
5. Plan ahead for taxes in retirement.
6. Prepare for healthcare costs.
7. Keep beneficiaries and documents up to date.
8. Stay alert to financial scams.
9. Coordinate income sources carefully.
10. Work with a fiduciary you can trust.

**QUICK TIP:**

*The difference between claiming Social Security at 62 versus 70 can be more than 75% in monthly benefits. Timing is not just about numbers—it is about your lifestyle vision.*



***The most rewarding part is knowing our members feel secure and supported.***

# What to Expect in a Consultation

**When you schedule a complimentary Retirement Review, you will receive personalized guidance—not generic advice. Together we will:**

- » Clarify your income strategy and retirement “paycheck”
- » Evaluate rollover options and consolidate accounts if needed
- » Review your comfort with investment risk
- » Build an action plan aligned with your lifestyle and legacy goals

**No pressure. No product pushing. Just real guidance from someone committed to your best interests.**



**RETIREMENT & INVESTMENT CENTER**



# Take the First Step Today

Whether you would like to attend an upcoming Academy event or schedule your personal Retirement Review, the Retirement & Investment Center is here for you.

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