

Investing In Retirement Is Different

ADVISER WEBINAR SERIES

+ Module three

Building and Modelling Retirement Portfolios

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Investing in Retirement is Different Series

+ Module 1

Retirement Risks and Challenges

Tuesday 11 August 2020

11:00 am – 11:45 am

+ Module 2

Building Portfolios for Retirees

Tuesday 18 August 2020

11:00 am – 11:45 am

+ Module 3

Building and Modelling Retirement Portfolios

Tuesday 25 August 2020

11:00 am – 11:45 am

+ Module 4

Retirement Tools and Solutions

Tuesday 1 September 2020

11:00 am – 11:45 am



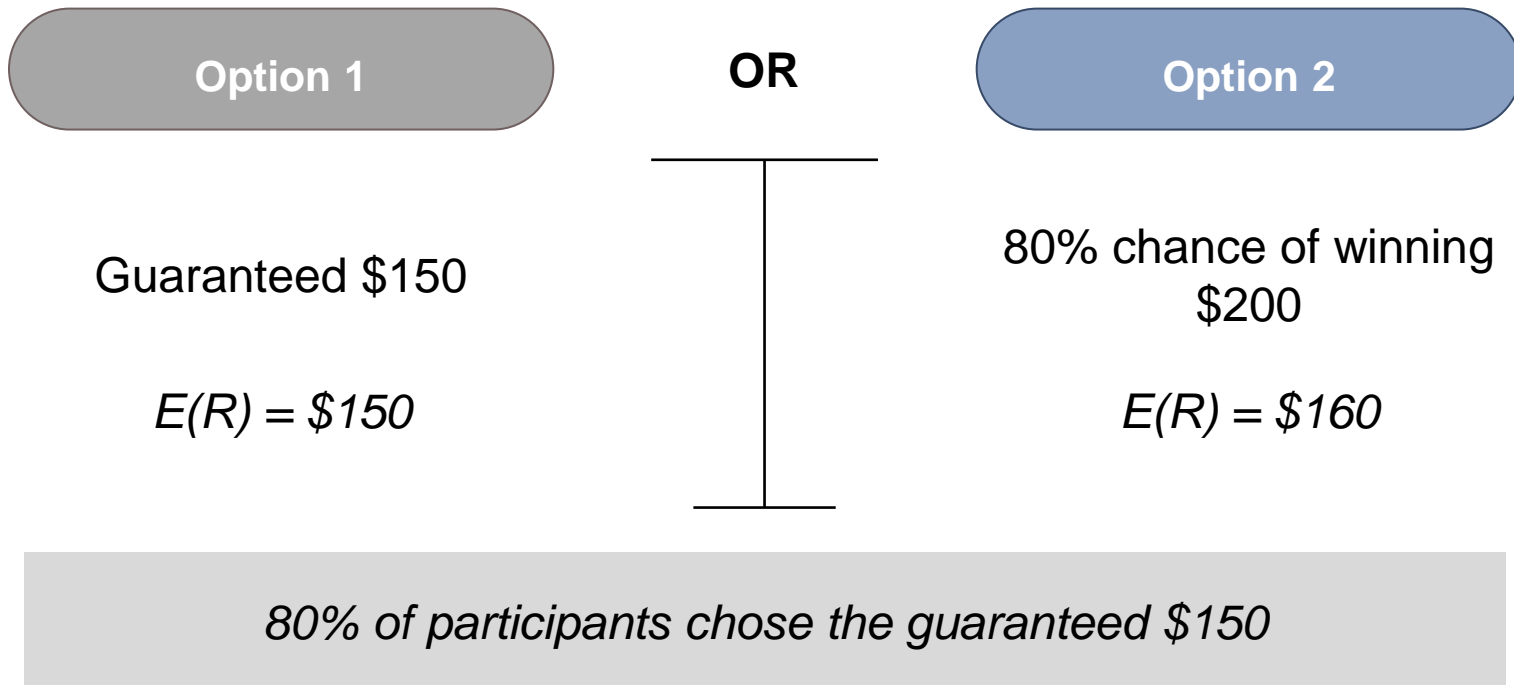
- + The Importance of Confidence
- + The Impact of Volatility
- + Retirement Portfolio Illustration Tool



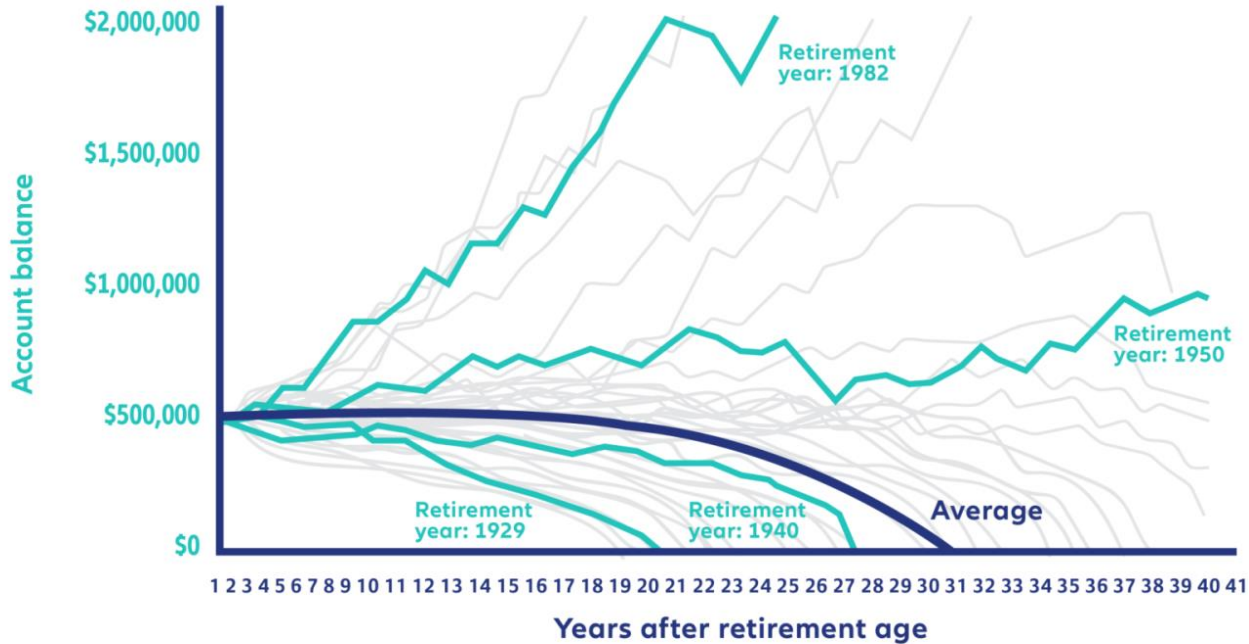
The Importance of Confidence



Importance of Certainty



Sequencing Risk



Source: Wealth Benchmarks™

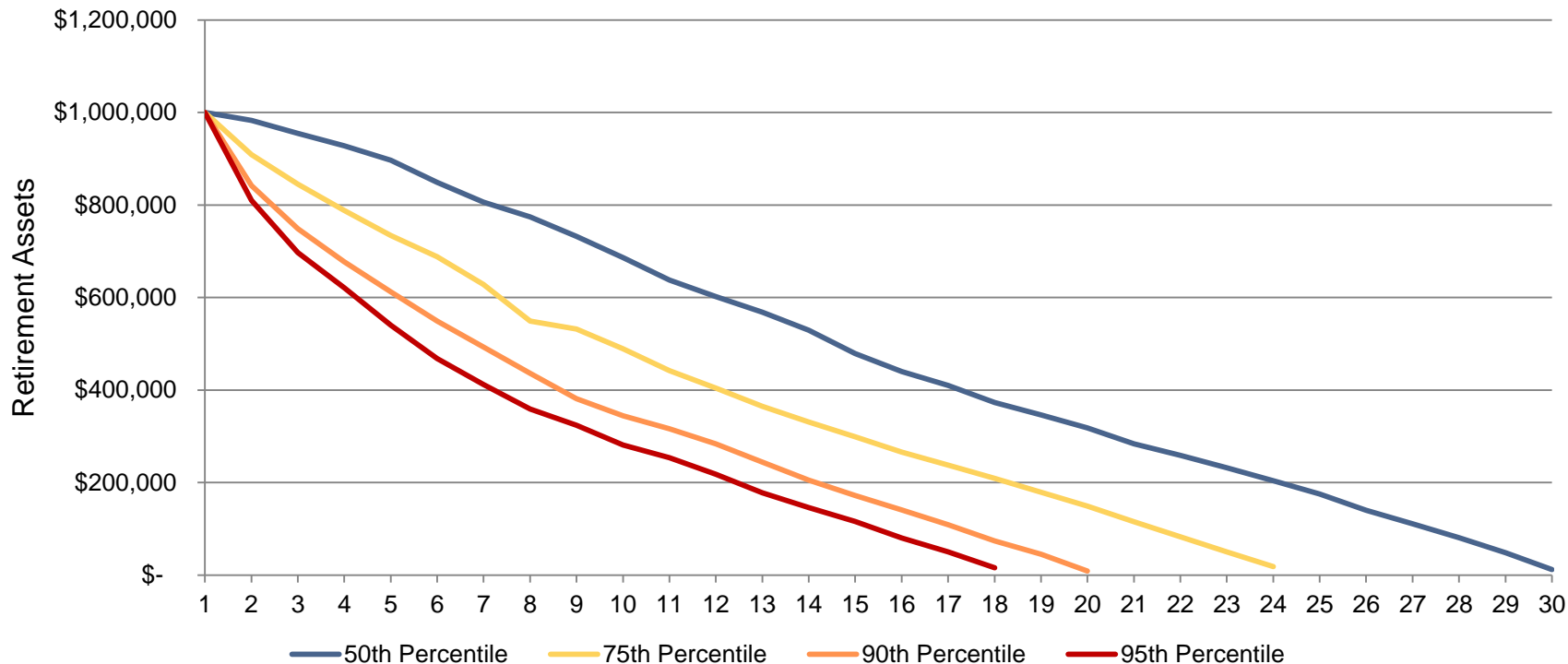
1. \$500,000 invested in a diversified, multi-sector 60/40 balanced portfolio – rebalanced annually. Drawdown equal to 5% of starting balance indexed to inflation at a rate of 3%
2. Employee Benefit Research Institute - Retirement Confidence Survey, 2013

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The Impact of Volatility



The Impact of Volatility



Source: Retirement Portfolio Illustration Tool (Investfit)

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