

The Sleep Easy Plan: Podcast

In my time as a financial advisor and portfolio manager I have seen many people come to the sudden realization that they haven't prepared fully for their retirement. It's not just that they didn't invest properly, sometimes they did have a good investment strategy.

It's more than that. Often it has to do with having not mapped out their financial future. How much will they need? How much are they likely to have? What type of lifestyle are they expecting? What are the implications of their current financial status projected into the future?

Suddenly they call me in a panic having not slept the past several days. They've felt "the jolt" from their lack of planning.

Today we talk about that "jolt", how to prevent it, and what to do if, or often when, you face it.

I hope you enjoy and take the lesson to heart.