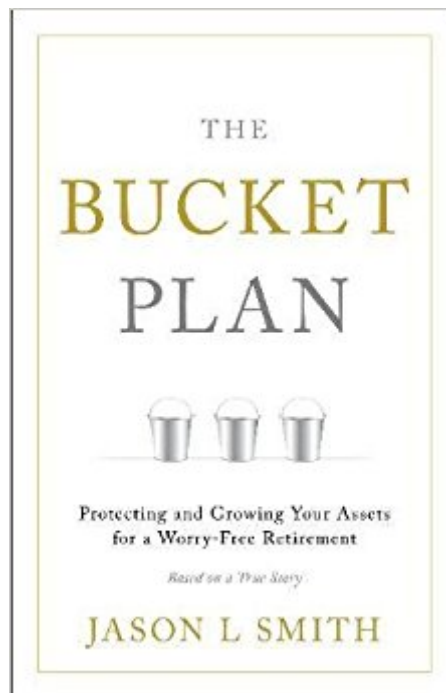




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# The Bucket Plan™: Protecting And Growing Your Assets For A Worry-Free Retirement



## Synopsis

Worry less. Plan more. Do you want a secure retirement, free from worry, stress, and confusion? The Bucket Plan<sup>®</sup> is a must-read book for anyone serious about creating a practical and sensible financial plan for his or her retirement years. The financial planning process outlined in this book is based on a three-bucket philosophy of strategically positioning assets to plan for and mitigate the risks and dangers that can occur in retirement. Readers will learn: The three biggest dangers for your financial future and how The Bucket Plan helps protect from them A formula for calculating whether you will have an income deficit and, if so, how much money is needed to prevent it A surefire way to avoid taking on too much investment risk on money you may need in the near future Much, much more When readers strategically allocate their money using Jason Smith's three-bucket philosophy, they can create a plan that mitigates risk and offers an opportunity for growth into the future, allowing them to feel more secure about retirement.

## Book Information

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## Customer Reviews

"Jason Smith's The Bucket Plan does a great job of distilling a wealth of sophisticated retirement planning wisdom into a simple story that anyone can understand. Read this, and let Jason open your eyes to the advantages of 'bucketing' your money to achieve the most successful financial plan to support the future you want now, soon, and in the distant future." --Dan Sullivan, Founder of The Strategic Coach, Inc. "The Bucket Plan is an easy to read, thought-provoking book that takes the reader on a journey that many of us wish we could travel. Jason Smith uses his creative genius to tell the story of a process that simplifies the often complex world of personal finance. In doing so, he

demonstrates the peace of mind and understanding of our financial concerns that Americans approaching or in retirement long to achieve.” --John Gilliam, Ph.D., MBA, CFP® , CLU® Texas Tech University, Department of personal financial planning “Aging well involves paying attention to our lifestyle and all the factors that can potentially impact it. Our financial well-being is definitely one of those factors. Jason Smith’s The Bucket Plan provides the right questions to ask and considerations needed to design a structured and comprehensive plan that will allow you to pursue a life of being all you can be.” --Dr. Roger Landry, award-winning author of Live Long, Die Short: A Guide to Authentic Health and Successful Aging “Jason Smith’s book is one of the best in the business. The Bucket Plan® planning process is absolutely the best way to serve your clients and motivate them to implement. Jason’s insights and processes are far and away above all others.” --Kerry Johnson, MBA, Ph.D. Best-selling author, speaker & coach “This book is both encouraging and motivating, so much so that you’ll want to get to the end of the Jerry and Irene story so that you can implement this immediately with your financial advisor. You won’t want to put it off for another minute.” --Ed Slott, America’s IRA Expert

Jason L Smith is a successful speaker, financial planner, author, coach, and entrepreneur. Following in his father’s footsteps as a second-generation advisor, he founded his financial services practice, The JL Smith Group, in 1995 to provide clients with holistic financial planning services that align investments, insurance, taxes, and estate planning into one comprehensive, coordinated plan. With the overriding goal of improving the lives of American families through holistic financial planning, Jason utilizes his experiences as a highly accomplished advisor to train other advisors through live training events, monthly coaching calls, and study groups. To better fulfill this mission, he founded Clarity 2 Prosperity Mastermind Group, a professional network of leading financial advisors nationwide, and Prosperity Capital Advisors, an SEC-registered investment advisory firm. Jason is an Investment Advisor Representative and a Certified Estate Planner (CEP), and he holds his Certification for Long-Term Care Planning (CLTC). He is a member of Ed Slott’s Master Elite IRA Advisor Group, an exclusive and influential organization of financial professionals who are committed to the study and mastery of IRA planning.

As a CERTIFIED FINANCIAL PLANNER® , I was introduced to this book through a colleague and it is spot-on in terms of identifying the biggest risks retirees face today. It provides an easy to follow fable on how Jerry & Irene were able to put a plan in place to mitigate those risks, ensuring they had their affairs in order to live out their worry-free

retirement. Financial strategies, taxes, investments, insurance, legacy planning, and Social Security/Medicare benefit coordination are very complex issues that can seem overwhelming. There are many books that give guidance on these topics individually, but it is rare to find a resource to provide guidance on coordinating all of these disciplines in a holistic approach. The true brilliance of this book is it takes those complex topics and simplifies them so you can understand what the author is teaching and relate it to your personal situation.

Focus on what you want, when you want it, and plan to achieve it are the overarching goals for this book on planning for retirement. The content has the usual look at assets, expenditures, and making sure partners understand their financial position. Six sections cover the money cycle, Bucket Plan philosophy, asset questionnaire, income cap assessment, volatility tolerance, and design the Bucket Plan. He provides several examples and worksheets. A majority of the statistics quoted throughout the book do not have sources or calculation parameters. There is no index or bibliography. I was randomly chosen through a Goodreads Giveaway to receive this book free from the publisher. Although encouraged, I was under no obligation to write a review. The opinions I have expressed are my own.

I am just getting back into the field as a financial planner after being out for 13 years. This book has given me a complete structure to follow with great purpose and great direction. It was a fun and easy read and is a MUST for EVERYONE as we all face the risk of running out of money in retirement. I promise, it is a joy to read!!! Enjoy.

As a millennial, money management and allocating my assets to account for taxes has never been emphasized or taught to me. This book walked me through a real-life example of how a couple created a comprehensive financial strategy for their retirement years and how they put systems into place to enable a worry-free retirement. This book is a great resource and easy read for anyone looking to put organization into their finances.

Really helps you understand the challenges faced in retirement using a real world scenario. Planning made simple, and understandable. A must read even for the person with no experience in financial planning or investing. Something advisors and clients alike will understand, learn and enjoy. A great read!

As a young professional, I needed a little guidance when it came to my finances. The Bucket Plan has helped me pull everything together and better plan for my future. I encourage people of all ages to read this book. It is so easy to relate to and definitely has given a better structure to my finances and future.

This book is great for beginning to understand how money works and provides guidance. It really is a great resource for managing money for retirement.

I've read the book and now I'm ordering it for one of my family members. It's a simple yet sophisticated and just makes sense!

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