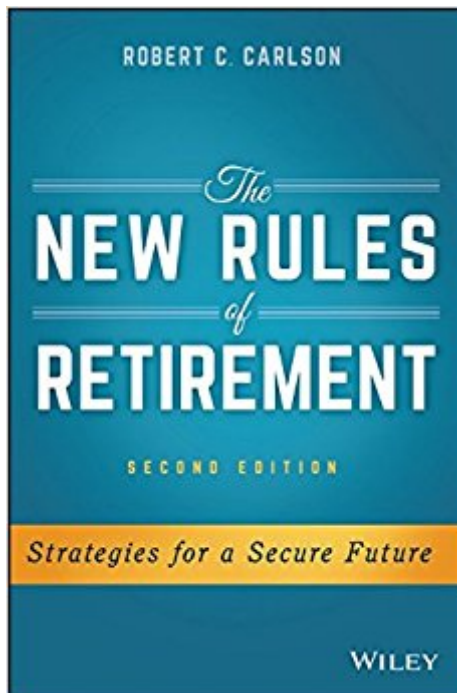




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# The New Rules Of Retirement: Strategies For A Secure Future



## Synopsis

Create the retirement you desire with proven financial strategies. The New Rules of Retirement throws away the rules of thumb, clichés, and obsolete ideas. It provides a proven, updated approach to retiring successfully in today's world. In this new second edition based on independent, objective research, retirement expert Robert C. Carlson uses proven, profitable techniques to coordinate all the factors that lead to financial security and independence. You'll learn how much you really need to save for retirement, how to invest that nest egg before and during retirement, and how to establish a wise and sustainable spending strategy. Carlson will explain how to overcome the threats to lifetime financial security, such as longer life expectancy, low investment returns, higher taxes, and more. Importantly, you'll learn how to plan for the wildcards of retirement planning: health care and long-term care expenses. This edition covers changes in key areas such as annuities, IRA management, estate planning, and income taxes. You'll learn how to merge these insights into your plan to enhance financial security and to provide for loved ones in the future. Retirement no longer means being put out to pasture. Today's retirees are traveling the world, attending classes, developing new skills, starting businesses, mastering neglected hobbies, and more—well into their golden years. This guide helps ensure you have the financial independence to pursue the retirement you want through smart planning and effective financial strategies. Know and overcome the threats to retiree financial security. Learn the right way to estimate retirement spending. Develop a sustainable spending strategy. Invest your nest egg to make it last. Plan for potential long-term health care. Leave a legacy for loved ones. The retirement is now a new phase of life, not a winding down. It's a time to live your best life and do things you couldn't before. But all the financial aspects of retirement have changed. To maintain financial security and create the retirement you desire, you need to be on top of the changes. The New Rules of Retirement provides the latest, proven strategies that help put the shine in your golden years.

## Book Information

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## Customer Reviews

The New Rules of Retirement says to throw away the old rules of thumb, conventional wisdom, and formulas. To retire successfully, you need advice developed for today's retirement. In this Second Edition, retirement expert Robert Carlson presents advice and strategies based on independent, objective, detailed research, which reflect today's retirement environment. Carlson shows you that retirement has changed and will change again. Today you face six critical threats to lifetime income security that past generations didn't face, including low investment returns, higher taxes, the deterioration of Social Security and Medicare, longer life expectancy, and more. Essential for both retirees and pre-retirees, this practical guide clarifies and gives updated advice on all the recent changes in key areas of retirement finance, including annuities, IRA management, estate planning, long-term care, income taxes, and more. This useful resource covers all the facets of retirement finance, including determining how much you can safely spend each year, helping the grandchildren, avoiding scams, and finding your best living options. Carlson explains how to: Create the retirement you desire, while avoiding common pitfalls Safeguard yourself against the wildcards of retirement planning; healthcare and long-term care expenses develop investing, spending, and lifestyle plans that support your goals of sustainable income and a legacy for your heirs You need to be ahead of the changes in retirement, and this convenient guide shows the way. You'll learn how to coordinate all the key factors that lead to lasting financial security and independence.

Praise for The New Rules of Retirement "As a Wharton graduate, money manager, Chief Financial Officer, and Certified Financial Analyst, I didn't think I needed help in making investment choices and planning for my retirement. I was wrong. I have been a subscriber to Retirement Watch since 1997. I trust Bob Carlson completely and follow his investment, tax, and planning advice personally." ;SANDY KAGAN, CFA, Retired CFO, Tatum Partners "A clear, practical, and wisely unconventional guide to the new world of retirement." ;HUMBERTO CRUZ, nationally syndicated financial columnist, Tribune Media Services "Bob Carlson does a magnificent job preparing readers for the many challenging issues they will face over the next several decades. Retirees can no longer count on generous asset returns and employer-provided defined benefit

plans. Bob provides readers with creative approaches for contending with these challenges to help ensure financially and emotionally secure "freedom years;"

—LAWRENCE E. KOCHARD, PhD, CFA, CEO and CIO at University of Virginia Investment Management Company

"Bob Carlson shows that three trends—demographics (baby boomers), increasing longevity, and fewer offspring—have changed forever the landscape facing America's retirees. Stereotypical retirement based on Social Security and employer pensions is out; making ends meet on your own is in. Better get yourself ready—and you can do so by reading this book."

—JAMES C. MILLER III, former U.S. Budget Director, Chairman of The CapAnalysis Group, LLC

As an advocate for financial literacy and a well-planned retirement I was very impressed with this book (received it hot off the press on 4/18/16). It is not a book on shilling must have stocks or "the one investment system" so often the premise of investment books. This book covers practically all of the areas one needs to plan, implement and enjoy retirement in its various forms. I don't know the author and have no agenda with the book. I just felt compelled to write this as it contains a large amount of useful information and ideas. I read the three hundred pages in three days and will re-read it as a reference for the future. No pics, no glitzy graphs - just great information in a readable format.

Excellent in all respects. Recommended reading BEFORE retiring rather than afterwards as I did. Have suggested its reading to lots of colleagues beginning to think about retirement.

Great little book! Chapters are short and come with a "take-away" at the end. . good summary! Easily understandable! Helped me go on to explore topics in more depth if I wanted more insight. I would recommend this as a great place to start your exploration of retirement. . and don't wait until you're on the precipice of retiring. . read before hand because there are steps that can be taken early!

The book is helpful but lacking in enough details for my expectation specifically around asset allocation. More helpful from a macro perspective with a special emphasis on Medicare and long term care. Jane Bryant Quinn book is a must read in this field

Excellent book - highly insightful and informative - highly recommend it.

Info about IRA to Roth conversion (before reaching 70 1/2) very helpful in confirming about what I previously had no confirmation.

Well written investment advice.

This is an excellent and informative book.

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