



# FERS+

## Roadmap to Retirement





# FERS+ Roadmap to Retirement is a step-by-step federal benefits and financial retirement process where we help you:

Create a Customized Retirement Income Plan



Optimize Federal Benefits



Create an Personalized Investment Strategy



Select Your Retirement Date



Chose Your Social Security Start Date



Elect a Long Term Care Strategy



Decide on your Life Insurance Strategy, & learn how to get Free FEGLI



# Select the Route which is Best for You.

## 01

**Financial Planning  
ONLY: One-Time fee  
FERS+ Comprehensive  
Financial Review**

**\$1,000**

## 02

**Advisory Client &  
FERS+: Rollover  
\$250,000+ in assets  
& FERS+ is FREE**

Investment Advisory Services are offered through Odiorne Point Asset Management, LLC, a registered investment adviser. Insurance products and services are offered and sold through individually licensed and appointed agents in all appropriate jurisdictions.

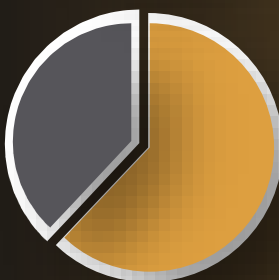
Licensed Insurance Professional. Investing involves risk, including the possible loss of principal. Insurance Company products are backed by the financial strength and claims paying ability of the issuing company. We are not affiliated with any government agency.



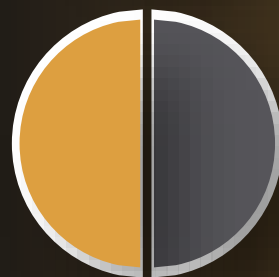
# Advisory Client



**Tactical:**  
**BEST ASSET TODAY**



**Conservative**




**Moderate**




**Growth**



**FIA**

 Fixed Income

 Equities

## Asset Management

.75-1.25% of AUM per year



No Commissions



No Trading Fees



Annual Reviews &  
additional meetings as  
needed.


Our Asset Management selection is a customized process for each investor.

Our investment process targets superior returns with less risk than traditional TSP or 401k investment choices.

Our FERS+*Roadmap to Retirement* process, integrates comprehensive financial planning with a specialized understanding of Federal Benefits to create a successful retirement plan for the Federal Employee.

**Gregory W. Lawrence CFP®, ChFEB<sup>SM</sup>**

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**Schedule an Appointment:**

For your convenience we do  
virtual appointments.

<https://calendly.com/roadmap-to-retirement>

