EBERST WEALTH ACADEMY

From a balance to a life.

Retirement foundations · Lesson takeaway

The idea to keep

Retirement planning connects cash flows and uncertainty. A portfolio balance by itself does not tell the whole story.

Check your understanding

Why can the order of returns matter during retirement?

Taking money out changes the amount participating in later returns. The order can therefore change the ending balance.

Bring the idea into your life

Which assumption or uncertainty matters most in my circumstances?

What would I like to ask Bruce before making a decision?

Continue learning

Read the lesson and explore its illustration
FINRA · Understanding investment risk

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