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PART III THE SEVEN STEPS TO
PENSIONIZE YOUR NEST EGG.

Chapter 12 Step 1: Identify Your Desired Retirement Income. Step 1 - Identify Your Desired Retirement Income. Estimating Your Desired Income from the Top Down.

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Allocation to Pensionize the Right Fraction of Your Nest Egg. Case Study: Jack and Jill Go Up the Hill (to Fetch a Retirement Income Plan) Step 1: Identify Your Desired Retirement Income. Step 2: Estimate Your Existing Pensionized Income. Step 3: Determine Your Pension Income Gap.

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a portion of their client's nest egg. When you hand over your money, it's a done deal. These are irreversible contracts.

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