

PFwise.com Monthly Newsletter - August 2016

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August 2016 Issue of PFwise.com's Monthly Newsletter

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PFwise.com Monthly Newsletter

Help you make wise personal finance decisions

Hello friends, welcome to the August 2016 [PFwise.com](#) Monthly Newsletter!

As you plan for your retirement, do you know that a permanent life insurance could be a smart and simple solution? In this newsletter, we will use a case study to illustrate.

The Current Situation

- Joe is a 55 year old CPA and his wife Jane is a 51 year old Teacher.
- They have been married for 20 years and have 2 kids.
- Joe has been working for over 20 years for his accounting firm. He is highly successful and has a nice, six-figure salary.
- He has been saving for retirement for years. He contributes to his company's 401(k) program, has IRAs, and investments.
- Jane was a teacher in her twenties but left the workforce for 18 years to raise their children. She has been teaching again for the last 3 years.
- Jane has an IRA and not much else toward retirement.
- They are both planning to retire at 65.
- They want life insurance to help maintain their lifestyle, no matter when one of them dies