

# Easy, Powerful Strategies to Avoid Outliving Your Money in Retirement

The numbers are scary. Most Boomers simply don't have enough money to retire.

According to a CBS News report, 53% of Boomers have less than \$250,000 in assets and more than a third are planning to rely on Social Security for most their retirement income - even though Social Security is only meant to replace about 40% of it.

And worse yet? Over 25% of Boomers don't have any retirement savings at all.

I've seen this up close as friend after friend has fallen into depression after the reality of retirement finances fell on them like a ton of bricks. Some had to take meaningless part-time jobs, some had to give up some of the very luxuries and lifestyle they worked so hard all their lives for, and many had to forget about the dream trips they had waited for decades to take.

***My wife and I are having a difference experience, though. We're going on vacations, spending time with our grandkids, and relaxing. Doing exactly what we want to do when we want to do it.***

We didn't make much more than they did, we just knew the secrets of retirement planning no one had taught them. We hated seeing them go through that and didn't want to see anyone else experience the same thing, so we did something about it.

And that thing is the Boomer Bliss Investment Club.

*"As a Baby Boomer about to enter retirement, I had so many questions about investing at this age, protecting what I have, how to deal with regular and emergency expenses, and so much more. But as soon as I joined the Boomer Bliss Investment Club, I found answers!"*

— J. Cunningham (use a pic of J. Cunningham)

Mitchell Rothbardt  
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## Welcome to The Boomer Bliss Investment Club – *the only wealth club created just for Baby Boomers.*

*The Boomer Bliss Investment Club is the only wealth club focused exclusively on bringing retirees and soon-to-be-retirees of the baby-boomer generation, relevant, actionable, and manageable financial information and advice to make their retirement joyful, relaxing, and meaningful.*

With the Boomer Bliss Investment Club, you'll learn exactly how to:

- Make smart investment moves ideal for **YOUR** risk threshold (not the risk threshold of those manic TV hedge-fund managers!)
- Protect your retirement income for life (we'll even help you get in better physical shape, so you'll be around longer to use it!)
- Slash expenses on housing, travel, shopping, gifts, utilities, and more.
- Support other family members, if needed, while still growing/protecting your assets.
- Make smooth financial transitions from life-altering events.
- Start a passion-project business, if you want!
- Enjoy the financial freedom you've worked so hard for and live the retirement lifestyle you've dreamed of.

Every stock tip, tax strategy, or piece of retirement advice has its unwavering focus on the Baby Boomer generation.

In a 2023 survey Allianz Life found that more than two-thirds of people had a greater fear of running out of money than dying and an AARP survey recently showed that many Boomers aren't even planning to retire until well into their 70s because they're just not prepared.

These problems are unique to our generation, so I got together with some of the Boomer Retirement experts that taught me how to plan for my dream retirement life (*I thank them from the bottom of my heart with every trip my wife and I take*) and we talked about what we were seeing happen to some of our closest friends. We wanted to help them and others that were struggling with their approaching retirement, so we decided to teach the simple and manageable strategies that gave us the *next-chapter* lives we dreamed of.

We created the Boomer Bliss Investment Club.

Let me introduce the Boomer Bliss Team. (At least the ones I'm allowed to introduce. One of our founders isn't legally allowed to be revealed due to the sensitive financial information he has access to each day.)

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My name is Marshall Lymon. I was an English teacher for 27 years. Not the job that usually leads to the sort of life my wife Kristi (also a teacher) and I live in retirement. Being able to take 3-4 trips each year, on top of the two-week trips to see our grandkids, was made possible by following the strategies I learned from the second of our 3 founders, William Munger.

If his last name sounds familiar that's because his father, Charlie Munger, was one of the most successful investors of the last 150 years, earning billions of dollars for his firm Berkshire-Hathaway, with his partner Warren Buffet. William learned investing strategies from his father that only the richest people in the world were able to put into play. Until now, that is.

The third of our founders is too active an investor to be revealed publicly (*the SEC worries that if any advice we give is attributed to him, it would cause too much of a market disruption*) although he's been known to swim in some *Shark-Infested* waters, if you know what I mean.

He saw what we were doing and wanted to be a part of it. He knew there was a need for a wealth club that was created **FOR BOOMERS – BY BOOMERS**.

And the Boomer Bliss Investment Club was born.

Since 2015 we've helped hundreds of Boomers just like you learn simple, manageable, and most importantly, effective financial strategies to be able to do things in retirement, like:

- Go on trips they've been dreaming of for decades. (Italian food and wine sound good to you?)
- Start businesses that fill their lives with meaning and purpose.
- Stop worrying about outliving their money.
- Help friends & family members in need, without losing their own financial footing.

*"My dear husband passed away just when we were beginning to enjoy retirement...I was overwhelmed and didn't know where to turn. Then I found Boomer Bliss Investment Club. Through the newsletter, I started learning about my money and the steps I could take to protect it."*

— H. Walters [\(Include pic of H. Walters\)](#)

There's a lot of financial services out there, but the Boomer Bliss Investment Club is different in one important respect – **IT'S THE ONLY WEALTH CLUB CREATED FOR BOOMERS – BY BOOMERS**.

Everything you'll read – every piece of advice you'll see – every easy-to-follow strategy you'll discover has one purpose:

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To let you sleep better knowing you can take dream trips...spend all the time you want with your grandkids...help family members that need it...all because your finances are where you need them to be to live your retirement years the way you always dreamed you would.

## Here's how it works...

**Each Week** you'll receive the ***Boomer Bliss Living-The-Dream Newsletter*** which includes:

- Up-to-the-minute financial insights affecting Boomers, so you'll grow your portfolio and/or protect the assets you worked your whole life to get.
- Clear take-aways from each article with simple steps, so you'll know exactly how to take advantage of each exclusive tip and strategy.
- Insider tip of the week. For instance ...
  - Cannabis stocks - What to look for.
  - Bitcoin for Boomers – Is the Bitcoin Lemon Worth the Squeeze?
  - Travel stocks - Still on the upswing in the “post-pandemic” world?
  - The #1 way to catch up if your funds aren't where they should be.
  - Scam-stopper tips.
- “*How I Did It*” profiles each week, detailing the exact steps Boomers like you took to live their unique dream retirement life.
- Exclusive Boomer Bliss Members-Only Deals (these alone can pay for your subscription!), featuring:
  - grocery discounts
  - travel vouchers
  - special event invitations (enjoy live theater?)
  - and more...
- *How-To-Of-The-Week* where you'll learn, step-by-step, how to do many of those “*I need to do this, but don't know how*” tasks that have been on your to-do list for weeks, months, or even years.
  - How do I set up an insurance trust for an adult child with a disability?
  - How do I set up a Stop-Loss to protect my investments?
  - And much more...
- Weekly Q&A column, answering topical questions from Boomers like you, concerning:
  - Money
  - Health
  - Travel
  - Home Improvements
  - Many more topics all answered by our expert panel of Boomers...

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- And don't worry about overly technical terms or advice. All advice is given in clear, easy-to-understand language, so you won't miss a trick.

**Each Month**, take part in exclusive online ***Boomer Bliss Good-Life Webinars***, where you'll learn in-depth details and strategies such as:

- Estate planning (your will/trust may not be relevant if situations have changed with your or your beneficiaries.)
- Managing life changing events.
- Mental health (according to a Gallup poll, depression among Boomers is higher than any other generation.)
- Physical health (if you want to play with your grandkids or travel, you need to stay in shape.)

And don't worry about anything you might have missed. All our previous webinars have been recorded and are available to watch anytime. (The one on navigating illness in our loved ones was incredibly powerful and important for me.)

**Each Quarter**, day-long online ***Boomer Bliss Finance-Fairs*** (for an additional fee) feature guest speakers (previous speakers include Samuel L. Jackson, Martha Stewart, and Barbara Corcoran) speaking on in-depth Boomer-related financial topics.

**And Twice Each Year** we hit the road for our famous ***Two-Day Boomer Bliss Money Road Show*** (for an additional fee.)

***If you have questions that deserve a more detailed answer or want the comfort that comes from consulting an expert one-on-one, than this is where you need to be!***

Attendees at our Road Shows can make one-on-one appointments with one of our Boomer Financial Experts to help you with questions that are a little more complex.

- Stock portfolio inspection, so a market crash won't destroy your life savings.
- Wills vs. trusts? Which should you have so your beneficiaries won't have to deal with probate court or other legal challenges.
- The best time to withdraw 401K funds to reduce your tax liability.
- Financial statement reviews so you'll know if you're ready to retire and, if not, when you will be.
- Investment advice customized to your financial position, age, and risk tolerance.

Many attendees have told us that the time they spent with our experts was worth multiple times the cost of the show!

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*"Last year, I attended a Boomer Bliss Money Road Show and learned exactly how to navigate Social Security and my husband's estate. Now I feel confident and ready to live my best retirement life near my grandchildren."*

— H. Walters

To sum it up, you get:

- **The Weekly Boomer Bliss Newsletter**
- **Free access to our Monthly Boomer Bliss Good-Life Webinars**
- **Exclusive Members-Only access to our on-line day long Quarterly Boomer Bliss Finance-Fairs (for an additional fee)**
- **Exclusive Members-Only access to our famous *Two-Day Boomer Bliss Money Road Shows* (for an additional fee) where you can schedule a one-on-one appointment with one of our Boomer Finance Experts.**

...And you get all this for just **\$19.99/month**  
(billed annually)!

And it's all **100% risk-free** to you!

***We feel so strongly about the Boomer Bliss Investment Club, that we're making it ABSOLUTLEY RISK-FREE for you to try out.***

If you don't feel like your first two issues are full of so many retirement-saving and stock-trading tips that your subscription will pay for itself 10-times over, (that can happen with JUST ONE or TWO TRADES!) we'll refund you 100% of your yearly subscription price, no questions asked. (And you can keep the two issues you already received as our gift to you, of course.)

The Boomer Bliss Investment Club is the only investment club created by Baby Boomers to specifically help other Baby Boomers like you live the retired-life you've worked so hard to achieve.

*I learned that for me, the retirement years should be about family, contributing my wisdom where it's appreciated, and staying focused on keeping more of my retirement funds that I worked so hard to earn. I could not have done this without Boomer Bliss."*

— T. Young (include pic of T. Young)

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Just click the link below and you'll be taken to the order page. Fill out the information and your first issue will be in your inbox in about 2 minutes. That means in less than 10 minutes from right now, you can take your first steps toward a booking a dream vacation, planning a trip to see your grandkids, or just feeling better about your financial situation!

**[Let's Do It - I Want To Feel Great About Retirement!]**

**Marshall Lyon**  
**Boomer Bliss Investment Club President**

P.S. You've worked hard all your life for what's coming next, and we know how worrisome it can be. That's why we started the *Boomer Bliss Investment Club* and that's why it's priced at just \$19.99 per month (billed annually). We want it to be as easy as possible for you to get the help you need to plan the next chapter of your life. That's why we guarantee that you can get 10x your yearly subscription cost back in investment gains in your first two issues alone.

And because living a vital and meaningful life in retirement is not only dependent on your financial health, but your physical health too, with your subscription you also get a **FREE Walking Program designed by our Boomer fitness experts**, so you can:

- Travel without worrying if you can walk to the legendary sights you've always wanted to see.
- Play with your grandkids and see them smile like the sun.
- Pick up your groceries, bags of potting soil, or cat litter like the **BOOMER BOSS** you are!

Of course, if after your first two issues you don't feel you can get 10x your yearly subscription price in investment returns, just contact us and get your entire yearly subscription cost refunded to you - no questions asked. And keep your first two issues and the walking program with our compliments.

Click the link above to join today and start getting ready for the life you've waited your whole life to live!

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[\[Order device page\]](#)

Stop Worrying And Start Living YOUR Dream Retired Life!

Get proven, effective, and manageable retirement strategies EVERY WEEK starting TODAY with the Boomer Bliss Investment Club. *The only wealth club created by Baby Boomers – For Baby Boomers –* And dedicated to giving you retirement strategies you can start using TODAY!

***For only \$19.99 per month (billed annually).***

*Hi – I want to confidently glide towards my DREAM retired life!*

*Please send me my first issue of the Boomer Bliss Investment Club Living-The-Dream Newsletter right away so I can start putting my retirement plan into action.*

*I understand that if I don't feel my first two issues are full of so many retirement-saving and stock-trading tips that my subscription can pay for itself 10 times over, I can get a refund of 100% of my yearly subscription price, no questions asked, and I can keep the first two issues and my FREE WALKING PROGRAM with your compliments.*

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I want to receive 12 issues of the Boomer Bliss Investment Club and glide towards my dream retired life. Please bill me \$239.88 with the understanding that, if after receiving two issues I don't think I can get back 10x my subscription cost in investment gains, I can get every penny refunded to me, while keeping the two issues and FREE WALKING PROGRAM with your compliments.

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