

Find Out if You Are Financially On Track...



Get Your Starter Roadmap

...and Get a Complimentary Starter Roadmap

Landing Page: Learn About What You'll Get



and your personal financial advisor
Rick Kahler

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Boulevard R



Do you know if you're on track? Find out and get a **Starter Roadmap**

In 5 minutes you can complete our simple 3-step process.

1. Tell us a little about your financial goals and current situation
2. Tweak your settings to see how small changes can improve your financial future
3. Review your Starter Roadmap and personalized Dashboard designed to help you get ahead

[Get Started >](#)

Still not sure?
[Check out our short video >](#)



[Get Started >](#)

"This may well be a peek at the future of financial planning itself."

Bob Veres
Inside Information

As featured in:

CNNMoney.com
A Division of CNN, Turner & Time Warner

MORNINGSTAR

Top Universities Using
Boulevard R's Process:

VirginiaTech
Invent the Future

TEXAS TECH UNIVERSITY



About Rick Kahler

Rick Kahler, MS, CFP®, recognized in 2009 by BusinessWeek as one of the 15 most experienced planners in the U.S., is a fee-only financial planner, author, and educator.

Recognized in 2008 by Wealth Manager magazine as the largest planning firm in his six state area, he became South Dakota's first CFP in 1983.
[Read More](#)

About Boulevard R

Boulevard R started out as a conversation between Jon and Matt Iverson over lunch in June 2005. As Jon was just about to turn 59 1/2 and start withdrawing savings from his retirement accounts, he was trying to figure out the best way to go about it.
[Read More](#)

Get Started With Your Goals



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Rick Kahler



What Are Your Important Financial Goals?

1 Click on the five goals you would most like to accomplish before retirement

Goals					Result	Dashboard
1	2	3	4	5	6	7
Save for College	Buy a Home	Pay for a Wedding	Accident Insurance	Emergency Fund	Dream Vacation	Max Out Your Retirement Account
Create a Will	Invest Better	Buy a Car	IRA Rollover	Have a Child	Reduce Spending	Minimize Tax Liability

Curious about the assumptions we're making?

2 Now drag the goals you want to accomplish before retirement to the appropriate point on the timeline

A horizontal timeline with a black bar. Above the bar are four orange boxes with labels: 'Now', '3 months', '1 year', and '3 years'. Vertical lines connect these boxes to the timeline. A 'Next' button is located at the bottom right of the timeline area.

Click On Your Financial Goals



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What Are Your Important Financial Goals?

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Curious about the assumptions we're making?

2 Now drag the goals you want to accomplish before retirement to the appropriate point on the timeline

Timeline visualization showing goals placed on a scale from Now to 3 years.

Timeline markers: Now, 3 months, 1 year, 3 years

Goals placed on timeline:

- Invest Better (at Now)
- Save for College (at 3 months)
- Dream Vacation (at 1 year)

Next

Organize Them On a Timeline



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What Are Your Important Financial Goals?

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Goals					Result	Dashboard
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Save for College	Buy a Home	Pay for a Wedding	Accident Insurance	Emergency Fund	Dream Vacation	Max Out Your Retirement Account
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Commuter Voucher	Retirement Savings	College Savings	Commuter Voucher	Retirement Savings	College Savings	Commuter Voucher

Curious about the assumptions we're making?

2 Now drag the goals you want to accomplish before retirement to the appropriate point on the timeline

Timeline visualization showing goals placed on a timeline:

- Now: Invest Better, Max Out Your Retirement Account, Save for College
- 3 months: (empty)
- 1 year: Dream Vacation
- 3 years: Start a business (Come Up With 'OPEN')

Next

Build Your Profile



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Where Are You Right Now?

What year were you born?

What is your relationship status? Married or Life Partner
 Single

How many children do you financially support?


What do you do for work?

What is the zip code where you live?

* So we can adjust for your cost of living.

Goals | Result | Dashboard
1 | 2 | 3 | 4 | 5 | 6 | 7

More on your goal



How much are you presently saving for college?

Answer

[Back](#) [Next](#)

By Providing Anonymous Information



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Where Are You Right Now?

Goals					Result	Dashboard
1	2	3	4	5	6	7

What year were you born?

What is your relationship status?
 Married or Life Partner
 Single

What year was your spouse or life partner born?

How many children do you financially support?

What do you do for work?

What is the zip code where you live?

* So we can adjust for your cost of living.

Survey

When it comes to planning and saving for retirement, would you say you are:

- on track
- ahead of schedule
- behind schedule

[Back](#) [Next](#)

Select Your Vision for Retirement



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What Will You Do When You Stop Working?

1 Click on the images that represent what you want to do in retirement



Travel



Motoring



Start New Career



Free Time



Family Time



Vacation Home



Give Back



Back to School



Spirituality



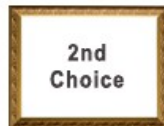
Pursue a Project

Curious about the assumptions we're making?

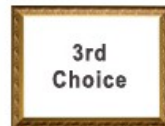
2 Now prioritize your retirement goals by clicking on an image and dragging it to where you want it



1st
Choice



2nd
Choice



3rd
Choice



4th
Choice



5th
Choice

Goals 1 2 3 4 5 Result 6 Dashboard 7

Back Next

By Clicking On the Images



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What Will You Do When You Stop Working?

1 Click on the images that represent what you want to do in retirement



Travel



Motoring



Start New Career



Free Time



Family Time



Vacation Home



Give Back



Back to School



Spirituality



Pursue a Project

Curious about the assumptions we're making?

2 Now prioritize your retirement goals by clicking on an image and dragging it to where you want it



1st Choice



2nd Choice



3rd Choice



4th
Choice



5th
Choice

Goals | Result | Dashboard
1 | 2 | 3 | 4 | 5 | 6 | 7

Back Next

Set Some Sliders



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How Are You Preparing To Reach Your Goals?

Click on the sliders and drag them to set the right value

How much do you make a year?

\$ 35,000 / year

[See your income forecast](#)

How much does your spouse make a year?

\$ 0 / year

How much have you and your spouse saved so far?

\$ 0

Include everything... retirement plans, trusts, CDs, investment and savings accounts


How much can you and your spouse typically save per month?

\$ 400 / month

Include everything... retirement plans, trusts, CDs, investment and savings accounts

Goals | Result | Dashboard
1 2 3 **4** 5 6 7

More on your vision < >



How often do you want to take a three week vacation?

[Answer](#)

[Back](#)

[Next](#)

To Impact the Calculation



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How Are You Preparing To Reach Your Goals?

Click on the sliders and drag them to set the right value

How much do you make a year?



\$ 80,000 / year

[See your income forecast](#)

How much does your spouse make a year?



\$ 45,000 / year

How much have you and your spouse saved so far?



\$ 500,000

Include everything... retirement plans, trusts, CDs, investment and savings accounts

How much can you and your spouse typically save per month?



\$ 1,700 / month

Include everything... retirement plans, trusts, CDs, investment and savings accounts

Goals | Result | Dashboard
1 2 3 4 5 6 7

Did you know...
The most popular goal for people in your income bracket is Invest Better

Back

Next

A Couple More Sliders



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How Are You Preparing To Reach Your Goals?

Click on the sliders and drag them to set the right value

Which of these debts do you have?

- Credit card Student loan Car loan Other

* Do not include any debt related to your primary residence

How much is your home worth?

\$ 0

How much do you owe on your mortgage or home equity loan?

\$ 0

How have you and your spouse invested your savings?

Half Stocks
50% Stocks, 40% Bonds, 10% Cash

Goals Result Dashboard
1 2 3 4 5 6 7

Did you know...
The most popular vision for people your age is Travel

Back Next

And You're Nearly There



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How Are You Preparing To Reach Your Goals?

Click on the sliders and drag them to set the right value

Which of these debts do you have?

Credit card Student loan Car loan Other

* Do not include any debt related to your primary residence

How much total debt do you and your spouse have?

 **\$ 18,000**

How much is your home worth?

 **\$ 330,000**

How much do you owe on your mortgage or home equity loan?

 **\$ 180,000**

How have you and your spouse invested your savings?

 **Mostly Stocks**
70% Stocks, 25% Bonds, 5% Cash

Goals | Result | Dashboard
1 2 3 4 **5** 6 7

Did you know...

The most popular vision for people your age is Travel

Back

Next

In 5 Steps, Find Out if You're On Track



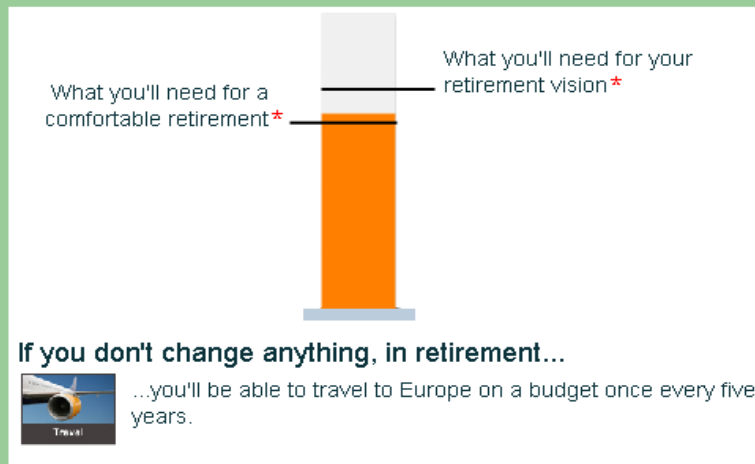
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See how you can get on track [CLICK HERE](#)

Goals | Result | Dashboard
1 2 3 4 5 **6** 7

How on track you are for retirement



Your results

If you save an extra \$200/mo

If you save an extra \$600/mo

When do you want to retire?

Retirement Age

69

[Methodology and Assumptions](#)

Fine tune your results

Social Security Benefits

\$2,100 /mo

Additional Retirement Income

\$1,600 /mo

Include pension, real estate, trusts, etc.

[See more variables](#)

* The results generated may vary with each use and over time due to simulations run on your investment returns.

[Back](#) [Next](#)

You Also Get an Online Dashboard



Rick Kahler, M. S., CFP®

Kahler Financial Group
Rapid City, South Dakota

Log Out

- Dashboard
- Your Goals
- "What If..."

Starter Roadmap

Profile

- Email
- Update Profile



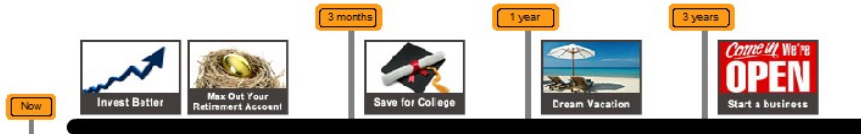
Your Time Line



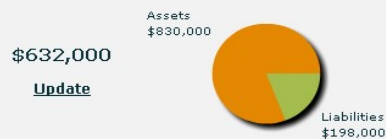
Goal: Invest better

Develop an investment strategy that fits your profile, while helping you achieve your goals.

Go



Your Net Worth



Update

Your Accounts

Description	Type	Value
Taxable trading	Taxable trading	
Traditional IRA	Traditional IRA	

Update Last Updated:

Your Articles



[I know I'm not supposed to try and time the market, but... what you can do when the financial markets go crazy.](#)



[College Days: The Long-term Impact of Borrowing to Finance College](#)



[The right fit: Choosing a small business retirement plan that works for you](#)

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Where You Can Look Into the Future with "What If" Simulations



Rick Kahler, M. S., CFP®

Kahler Financial Group
Rapid City, South Dakota

[Log Out](#)

Dashboard

Your Goals

"What If..."

Starter Roadmap

Profile

Email

Update Profile



"What If" Simulations

Click on the images below to see their impact on your financial situation. To de-select an image, click on it and then select "cancel."

Life Events

Ways to Get Ahead

Your Goals



Invest Better



Save for College



Dream Vacation



Start a business



Max Out Your Retirement Account

Your selected options



Receive an Inheritance



Vacation Cheaper



What you're on track to have by retirement:

What you'll need for a comfortable retirement:

What you'll need to afford your vision for retirement:

* Dollar values are calculated in today's dollars



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Your Starter Roadmap Will Then Be Emailed to You As a PDF Attachment

