



CHARLIE
EPSTEIN

Charlie Epstein, America's 401k Coach, is a man on a mission to kill retirement. Author of two books, ***Paychecks for Life*** and ***Save America, Save*** and the host of the popular podcast "Killing Retirement", Charlie instead implores Americans to stop living with the outdated notion of retirement (which Webster's Dictionary defines as "to put out of use"). Instead, Charlie advocates for us all to begin doing the work you love **today** and build a paycheck for life. Who wants to be "put out of use, anyway?"



Audience/s:

Entrepreneurial professionals, men & women, 40+ (HH income 150k+) who wish to build the life of their dreams, spend more time with family, friends and good works while leading a business that is mission-driven to make the world a better place.

- They believe they have choices and are empowered to make financial choices – they do not believe in being handed anything or that they are entitled to a retirement – particularly if they're not included in it's design.
- They may be married to a professional or a career-minded individual and generally have children in high school or college.

Charlie's Mission:

Charlie Epstein, America's 401k Coach, is a man on a mission to "kill retirement". Author of two books, ***Paychecks for Life*** and ***Save America, Save*** Charlie instead implores Americans to stop living with the antiquated notion that they should slave for 40 years only to retire at 65 and do nothing – except live in fear that you will outlive your savings. Mr. Epstein backs the notion that we should all retire from that paradigm now, begin doing the work you love and build a paycheck for life. 401kWire has named Charlie one of the **Top 100 Most Influential People in the Retirement Industry** along with one of the Top 300 Most Influential Retirement Plan Advisors in the U.S.

1. Charlie started his career on a traditional path – with a twist.

As a young man, Charlie was inspired by his very successful grandfathers: one traditionally successful in business, the other, successful in the arts and stage. Charlie longed to combine these two powerful legacies and began taking months off during the summer to act in plays and theater. During the years he took three months off in favor of the stage, his financial success grew – faster and larger than during years he did not participate. This experience laid the foundation for the powerful idea that following one's heart would lead to financial success.

2. Charlie was an early adopter of advanced financial principles.

Charlie has long believed that one of the cornerstones of a successful financial and overall life is to view finances through the powerful prism of entrepreneurial strategies. Eliminating entitlement and instead taking control over your financial future are paramount to building a paycheck for life.

3. Charlie utilized the tools & technology of performance to reach his large audience.

- As an entertaining national speaker and sought-after thought leader in the financial world, Charlie regularly shares his knowledge with other financial leaders. Currently, his content is received by over 100,000 followers.
- His new podcast, ***Killing Retirement***, takes a holistic view of this important stage in our lives. Interviewing experts in longevity, health, wellness, retirement, happiness and work, Charlie explores how to live our lives from a place of empowerment and joy.
- He also has contributed many articles for industry publications, including the ASPPA Journal, Financial Advisor Magazine, BenefitsPro, Advisors4Advisors, RPMI Weekly and NAPA Net.

Official Bio

Charlie has over 33 years of professional experience in the financial services industry. As the principal of Epstein Financial Group, LLC and Epstein Financial Services, a registered investment advisory firm, he continually provides corporate retirement plan consulting, as well as wealth management and financial planning services to business owners, professionals and individual plan participants.

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An entertaining and influential speaker, Charlie has spoken on many main industry conference platforms, including MDRT, DCPI, ASPPA and CFDD. He also has contributed many articles for industry publications, including the ASPPA Journal, Financial Advisor Magazine, BenefitsPro, Advisors4Advisors, RPMI Weekly and NAPA Net.

Charlie's first book; Paychecks for Life: How to Turn Your 401(k) into a Paycheck Manufacturing Company, released in January 2012, has sold over 15,000 copies thus far. Paychecks for Life and its nine principles are solely focused on teaching Americans how to maximize the 401(k)

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