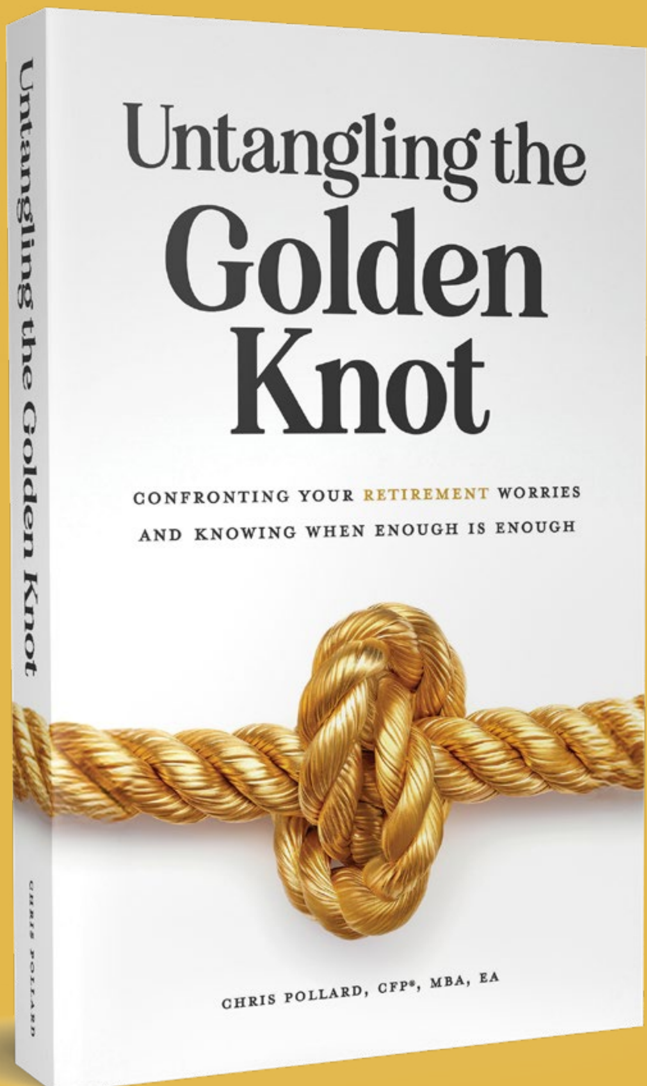
Media Kit



Clear, compassionate, and actionable, *Untangling the Golden Knot* shows you how to replace worry with wisdom so you can spend, give, and live without fear.

Untangling the Golden Knot

CONFRONTING YOUR RETIREMENT WORRIES AND KNOWING WHEN ENOUGH IS ENOUGH

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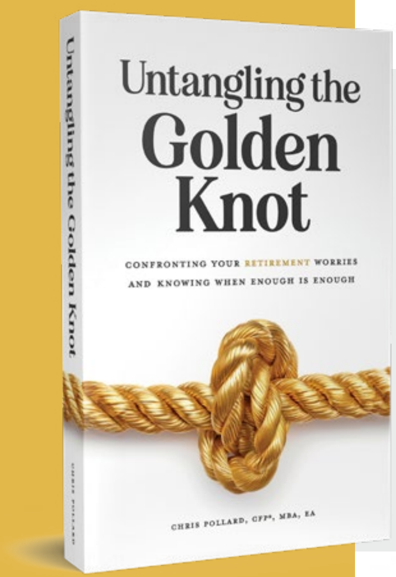
TOPICS INCLUDE

- Retirement Planning
- Wealth Management
- Self-Help

About the Book



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The transition to retirement is supposed to be the reward for decades of work and saving. Yet for many, that transition feels more like stepping into the unknown. The questions won't stop circling: How much is enough? What if the market crashes? What about inflation? What if I outlive my savings?

In *Untangling the Golden Knot*, U.S. Army veteran and CERTIFIED FINANCIAL PLANNER® practitioner Chris Pollard draws on decades of experience guiding high–net worth families to reveal why financial security doesn't automatically bring peace of mind—and what to do about it. Pollard blends the technical side of wealth management with the human side of retirement so you can stop second-guessing and start fully living without financial fear.

More than charts and spreadsheets, this book reshapes the way you think about money and the meaning of life to ask the questions no financial plan can answer: What are you retiring to? What will give you meaning in the next phase of life? How can you use your wealth to strengthen your family, support causes you care about, and build a legacy that lasts?

DISCOVER:

- Exactly what "enough" means for you—financially and personally—so you can stop chasing an ever-moving target.
- Shift from a lifetime of saving to spending with financial clarity.
- Build a long-term care plan that reduces stress for yourself and your loved ones as you age.
- Identify "activity gold," fulfilling passion pursuits that deliver multiple layers of meaning.
- Use simple decision-making tools to avoid retirement anxiety and act with assurance.

Clear, compassionate, and actionable, *Untangling the Golden Knot* shows you how to replace worry with wisdom so you can spend, give, and live without fear. If you're ready to enjoy the retirement you've earned, this book will help you untangle the knot of uncertainty and step into lasting peace of mind.

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About the Author

CHRISTOPHER POLLARD, CFP®, MBA, EA, is a U.S. Army veteran, West Point graduate, and trusted financial advisor with more than 15 years of experience helping individuals and families achieve clarity and confidence in their financial lives. As principal of Great Path Planning, he specializes in guiding high–net worth families through the critical transition from accumulating wealth to living well in retirement.

Drawing on his expertise in retirement income planning, tax strategy, and wealth management, Pollard blends the technical side of finance with an understanding of the personal, emotional, and family dynamics that shape financial decisions. He has a particular passion for supporting entrepreneurs and business owners, combining his own experience as an entrepreneur with proven strategies to help others succeed personally and professionally. His mission is to move clients beyond financial anxiety so they can enjoy security, purpose, and fulfillment.

Pollard began his financial career in 2008, just as the world reeled from the financial crisis, and met with his first client in 2009. Since then, he has served in advisory and private wealth-management roles, including as a wealth manager with USAA and chief operating officer of Regent Wealth Management Group. He launched his own firm in 2016 and previously ran an accounting and tax practice as an enrolled agent. In addition, he has taught finance and planning as an adjunct instructor at Berkeley College, leading courses in principles of financial planning, insurance planning, estate planning, entrepreneurship, and more.

Pollard holds a BS in electrical engineering from the United States Military Academy at West Point and an MBA with a major in personal financial planning from Georgia State University. He is a CERTIFIED FINANCIAL PLANNER® practitioner, an enrolled agent with the Internal Revenue Service, and a veteran of Operation Iraqi Freedom, where he led an infantry platoon during a combat tour.

He lives in New York with his wife, Elizabeth, and their two sons, Nathan and Alex. Away from financial planning, he enjoys playing keyboards and synthesizers, woodworking, cooking, and spending time with their dogs, Goose and Ellie.

To learn more, visit **https://greatpath.com** or connect with Pollard on LinkedIn.

Topics Include

Chris Pollard talks about how to enjoy your wealth without fear and live a fulfilling retirement. He shows readers how to shift their mindset from worry to confidence, balancing money with meaning.

- Retirement Anxiety: Why Wealth Doesn't Ease Worry
- Spending with Confidence: Moving Beyond Financial Fear
- Retiring to Joy: Designing Life, Not Just Savings
- Worries and Wisdom: Lessons From High Net Worth Retirees
- Next Chapter Success: How to Spend, Give, and Enjoy
- Wealth Without Worry: Transforming Scarcity into Abundance

Book Excerpt

INTRODUCTION

Dear Reader,

Does thinking about retirement keep you awake at night? *You have enough money.* At least, that's what your financial planner keeps telling you. You've met with them more than a few times. They laid out all the numbers and explained that your hard work and wise decision-making over the decades have paid off. You have plenty of money to stop working, invest, travel, buy nice things, donate to your favorite charities, spoil the grandkids, and even leave a sizable portion behind as part of your legacy.

So, what's the problem?

This book will focus on helping you stop worrying. You've already saved wisely and are either approaching retirement or planning to take the leap in 5 to 10 years. You need to know how to transition—financially and psychologically—from saving to spending. You must stop worrying and start enjoying yourself.

This book isn't for those who need to know how to build a strong portfolio or what to set aside in their 401(k) from their employer. Many books have already been written offering advice on how to ensure you have enough.

My name is Chris Pollard. I grew up on Long Island, New York. Seeking adventure and a challenge, I joined the U.S. Army Reserves when I was 17 before attending West Point from 2000 to 2004. The Academy had a clear view of New York City. I'll never forget watching the smoke billowing from the World Trade Center on 9/11.

I deployed to Iraq in 2006 after graduating from West Point and led an infantry platoon. I had initially planned to stay in the military and become a chaplain, supporting soldiers' and their families' emotional and spiritual needs, but I felt I needed a change in direction. Having majored in electrical engineering with a focus on computer architecture, I enjoy math, meticulous analysis, and planning. Toward the end of my service in the military, I became very interested in personal finance and investing. I had seen family and friends worrying about finances while making good and bad decisions. I felt inspired to combine all of my interests, taking care of others, applying math and analysis, and personal finance, and become a financial planner.

I originally started by working as a financial advisor for military officers and their families. After getting an MBA in Personal Financial Planning and attaining the Certified Financial Planner designation, I served in wealth management roles for successful professionals, from doctors to inventors to college professors. I've taught financial planning at the undergraduate level. I also started and ran an accounting and tax practice as an enrolled agent, and, as of this writing, I am the principal owner at Great Path Financial Planning (GPFP).

At GPFP, we specialize in retirement income planning for people within five years of retirement. We serve business owners, entrepreneurs, and other self-employed individuals who have accumulated a large amount of the money they need to retire with little to no *mathematical* likelihood of running out. However, many of my clients express concerns that they could run out of money and "go back to the poor house."

I wrote this workbook because the path to enjoying retirement can be like a golden knot. It can be hard to pull apart and separate the things that hold you back—complex emotions, personal histories, and fears about the future. Above all, if you're like my clients, I wrote this book to help you *believe* you have enough to feel good about the next phase of life—retirement.

This workbook has nine parts and is based on conversations with soon-to-be and embarking retirees. Each part is divided into chapters, followed by a review section and questions and activities for self-reflection and discussion.

These questions are some of the same ones that I send my clients home with after our meetings. Some people will answer them with long, narrative replies, while others find short, bulleted responses are better. Others may find it easier to record their answers on their phones or even talk about them with a great listener. What matters is that you thoroughly consider the points and give yourself something to revisit when needed.

If you are doing this exercise with a spouse or a partner, I recommend completing it separately and waiting until you have both gone through the exercises before comparing your answers. You can be surprised by what you learn, even when the answers are from the person you eat and sleep with daily.

I use a handful of characters to illustrate the points in these chapters. They are amalgamations of the many clients I've seen throughout my practice. You'll meet Jim and Joyce, Sue, Martha, and Timothy as they navigate their own golden knots in their quest for happy retirements.

I hope this workbook will be a starting point for your journey to a more fulfilling and enjoyable retirement that reflects your true desires.

Let's untangle this golden knot by starting with your current life and where you want to go with your retirement. Let's find the right path *for you.*

Chris