

Q&A Worksheet

So now you know...Where do you go next?

1. How will you spend your time in retirement? Jot down a few priorities.

2. Identify your expected sources of retirement income.

3. What other sources of money might you draw on in retirement?

4. In considering retirees' financial risks (longevity, inflation, overspending, and healthcare) which one concerns you most and why?

5. What steps might you take to protect your savings from the risks of longevity and inflation?

6. What retirement-planning issues do you need to discuss with a financial professional? Note a few.

Name _____

Date _____

