

# 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.

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2. Identify your expected sources of retirement income.

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

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

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

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

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Name \_\_\_\_\_

Date \_\_\_\_\_

