

Q&A Worksheet

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

1. What are you doing now to prepare for retirement today?

2. Given what you know today, what sources of income might you have available in retirement?

3. Think about saving for retirement today—what could you do differently?

4. Knowing you should not “set and forget” your retirement savings plan, what could you do each year?

5. If you could meet with a financial professional, what questions might you ask?

6. What are your next steps following this presentation?

Name _____

Date _____

