

Q&A Worksheet So now you know...What do you do next?

1. What resources I can count on for retirement?

(Check all that apply. Research later how much each resource may provide.)

Other resources to consider:

- CDs/Savings Accounts
- IRAs/Annuities
- Mutual Funds
- Stocks/Bonds
- Real Estate/Collectibles

	Monthly Income	Total Assets
<input type="checkbox"/> Social Security	\$ _____	\$ _____ \$ _____ \$ _____
<input type="checkbox"/> Pensions	\$ _____	
<input type="checkbox"/> Rental Income	\$ _____	
<input type="checkbox"/> Employer’s Plan		
<input type="checkbox"/> Inheritance		
<input type="checkbox"/> Personal Savings/ Investments (see box)		

You should consider the investment objectives, risks, and charges and expenses of the variable product and its underlying fund options; or mutual funds offered through a retirement plan, carefully before investing. The prospectuses/prospectus summaries/information booklets contain this and other information, which can be obtained by contacting your local representative. Please read the information carefully before investing.

2. How I envision spending my retirement?

Questions to consider:

- How do you want to spend each day?
- Who do you want to spend your time with?
- How many trips do you want to take each year?
- Will you continue to work? Volunteer?
- What leisure activities/hobbies will you pursue?
- How do I use the Create the Vision CD to hone my plans for the future?
- How will you stay fit?



