



## OPTIONAL PRE-WORK

# Retirement Strategies: Creating Your Plan

Your experience will be enhanced if you complete the following before the presentation:

### 1. Log in or Create an Account

Go to [www.yretirement.org](http://www.yretirement.org). If you have any issues logging in, please contact Customer Service at 1-800-738-9622.

Once on your Home Page:

#### **Statement of Account Balances**

- On your home page, you will be viewing your Retirement Plan and/or Savings Plan totals.
- Below these plan totals is a button 'print a summary of these results'. Print results. These will be the most updated account balances.

#### **Lifetime Income Projection**

- Under **Tools** on the left side menu, select **Lifetime Income Tracker**
- To customize your lifetime income payment estimate, Click 'Customize' to enter your retirement date, salary information and which Plans to include, Survivor information and selection of an annuity option. Click 'Complete' to return to the Lifetime Income Tracker home page and select 'print' at the top right corner of the Lifetime Income Tracker.

### 2. Social Security


#### **Social Security Statement**

Obtain a copy of your Social Security Statement to bring with you to the seminar.

- Go to [www.ssa.gov](http://www.ssa.gov)
- Sign In or Create an Account
- Once you are signed in, agree to the Terms of Service
- Click on Print/Save Your Full Statement

If applicable, you may also want to do this same process with your spouse.

### 3. Activity Checklist

-  On the next page, check any activities that you plan to do in retirement and/or add your own.

**We look forward to seeing you at the seminar!**



## CHECKLIST FOR Activities in Retirement

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Acting               | <input type="checkbox"/> Fishing               | <input type="checkbox"/> Reading                     |
| <input type="checkbox"/> Bird watching        | <input type="checkbox"/> Gardening             | <input type="checkbox"/> Refereeing                  |
| <input type="checkbox"/> Boating              | <input type="checkbox"/> Genealogy             | <input type="checkbox"/> Religion                    |
| <input type="checkbox"/> Bowling              | <input type="checkbox"/> Golfing               | <input type="checkbox"/> Repairing/Renovating        |
| <input type="checkbox"/> Camping              | <input type="checkbox"/> Hiking                | <input type="checkbox"/> Scrap Booking               |
| <input type="checkbox"/> Club/Society         | <input type="checkbox"/> Investing             | <input type="checkbox"/> Sewing                      |
| <input type="checkbox"/> Coaching             | <input type="checkbox"/> Jogging/Running       | <input type="checkbox"/> Sporting Events             |
| <input type="checkbox"/> Collecting           | <input type="checkbox"/> Kayaking              | <input type="checkbox"/> Swimming                    |
| <input type="checkbox"/> Continuing Education | <input type="checkbox"/> Knitting              | <input type="checkbox"/> Teaching/Mentoring          |
| <input type="checkbox"/> Cooking              | <input type="checkbox"/> Movies                | <input type="checkbox"/> Traveling/Vacations/Cruises |
| <input type="checkbox"/> Crafts               | <input type="checkbox"/> Museums/Art Galleries | <input type="checkbox"/> Volunteering                |
| <input type="checkbox"/> Cycling              | <input type="checkbox"/> Music                 | <input type="checkbox"/> Walking                     |
| <input type="checkbox"/> Dancing              | <input type="checkbox"/> Painting              | <input type="checkbox"/> Woodworking                 |
| <input type="checkbox"/> Entertaining         | <input type="checkbox"/> Part-time Work        | <input type="checkbox"/> Writing                     |
| <input type="checkbox"/> Exercising           | <input type="checkbox"/> Photography           | <input type="checkbox"/> _____                       |
| <input type="checkbox"/> Family Activities    | <input type="checkbox"/> Politics              | <input type="checkbox"/> _____                       |
| <input type="checkbox"/> Family Outings       | <input type="checkbox"/> Quilting              |  |