



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. 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.

Annuity Estimate

The goal is to have a copy of the options in front of you; do not worry about the actual age you plan to retire, but feel free to create what works for you.

- Under **Tools** on the left side menu, select **Annuity Estimate Calculator**
- For your 'Retirement Age' select the age you plan/may want to retire
- Enter your annual gross wages under 'your current annual salary'
- You may leave all other buttons as checked and select 'Calculate'
- Select 'print a summary of these results'

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
- 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 | |