



## 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**
- For your 'Retirement Age' select the age you'll start income, select the dollar or percentage amount you'll contribute per pay period, then "Calculate"
- To customize your lifetime income payment estimate, Click "Customize" to enter your salary information, survivor information and annuity options. Follow the prompts, then click "Print" or "Complete"

### 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              |                                                      |