

Retirement Worksheet

INFORMATION TO TAKE TO YOUR ADVISOR

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fear
65.

▶ How old am I now? _____ When do I hope to retire? _____

▶ How much have I saved?

- Retirement Accounts _____
- Other _____

▶ What is my expected Social Security benefit? (monthly) _____

▶ Do I have other sources of retirement income? (monthly)

- Pensions _____
- Rentals _____
- Alimony _____
- Part-Time Employment _____
- Other _____

▶ What are my expenses now? After retirement?

Pre-retirement

Housing _____

Transportation _____

Utilities _____

Medical _____

Insurance _____

Other _____

Post-Retirement

Housing _____

Transportation _____

Utilities _____

Medical _____

Insurance _____

Other _____

▶ What kinds of things do I hope to do in retirement (travel, golf, purchase an RV or vacation property, etc.)?

▶ How much do I want to leave behind for loved ones or charity?

Questions to ask your advisor

- Can I afford to retire on my target date?
- How should I allocate my investments during retirement?
- How do I turn my nest egg into income?
- How can I make sure my income lasts 25-plus years?
- What income guarantees are available?
- How can I make sure my income keeps pace with inflation?
- Can I make sure my spouse continues to receive income?
- Can I make sure my beneficiaries or a favorite charity get something after I'm gone?

A MESSAGE TO YOUR ADVISOR

Symetra Life Insurance Company is a retirement income specialist with more than a half-century of experience helping people live their retirement dreams. For retirement income solutions, calculators and quote tools, please visit us online at www.symetra.com or call us at 1-800-706-0700.