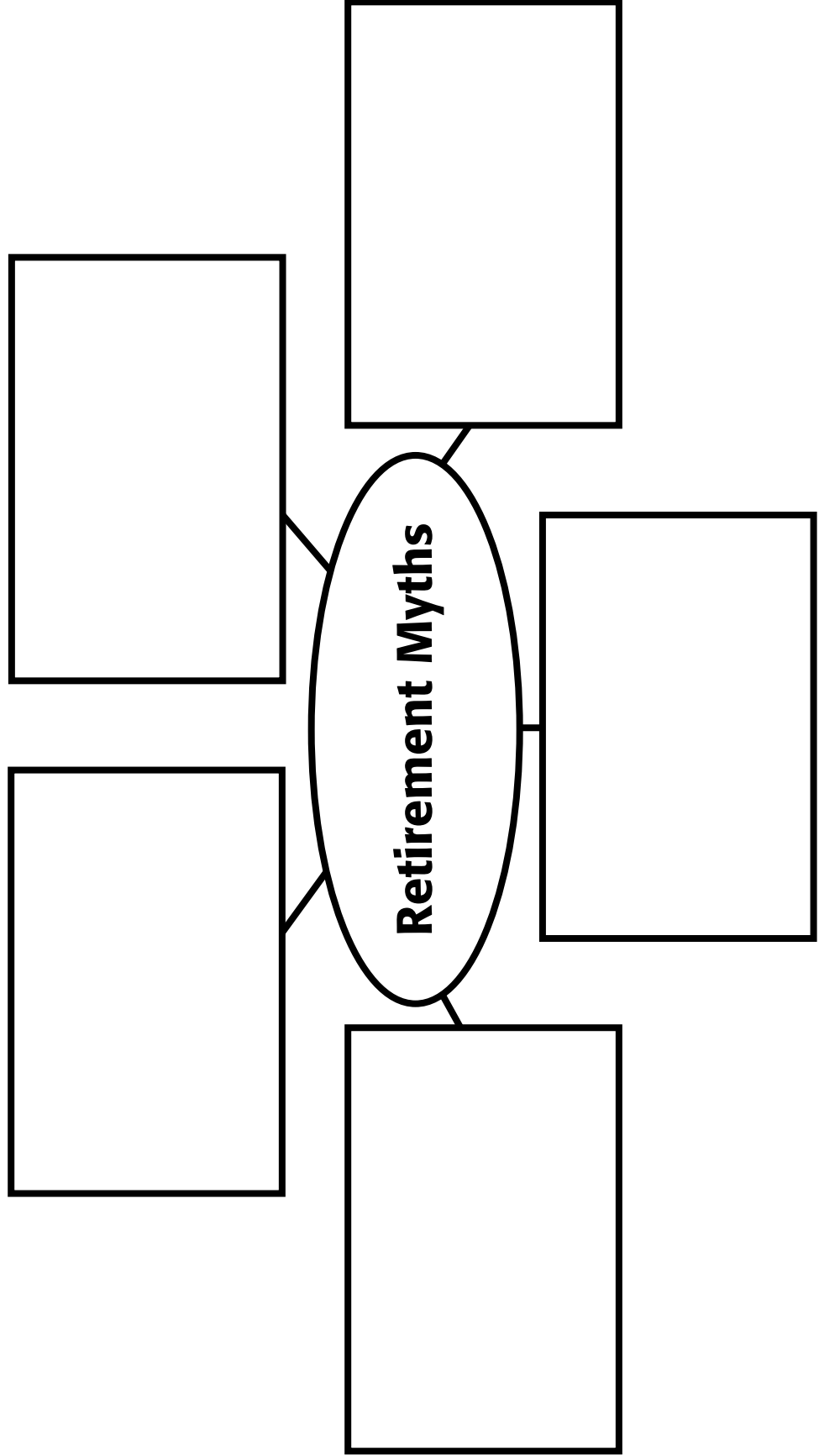


RETIREMENT PLANNING

Study Organizer

Directions: Name some common myths about retirement planning.



PLANNING RETIREMENT INCOME

Study Organizer

Directions: Write five ways to make the most of a 401(k) plan.

401(k) Plan Management

1.

2.

3.

4.

5.

ESTATE PLANNING AND TAXES

Study Organizer

Directions: In the chart below, identify the four types of trusts.

