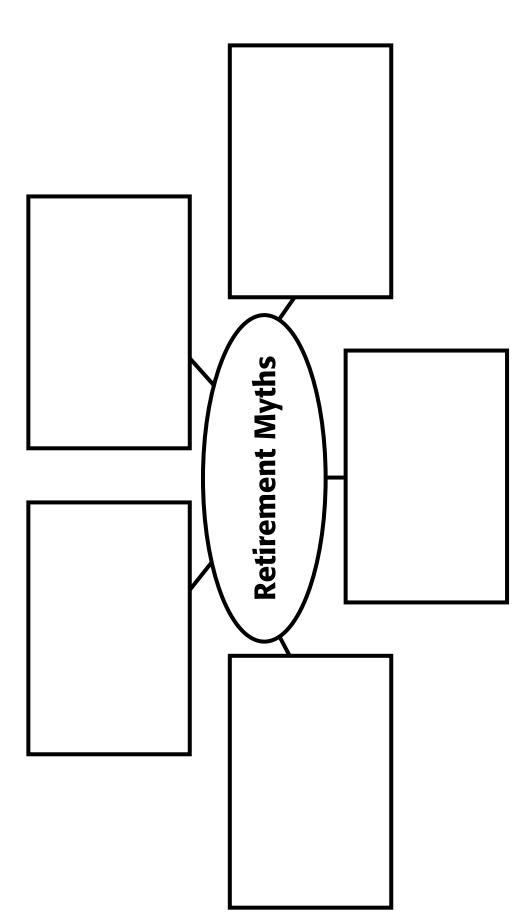
RETIREMENT PLANNING

Study Organizer

Directions: Name some common myths about retirement planning.





| Name: | Date: |
|--|-------|
| ************************************** | |

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. | | | |
| | | | |

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| Name: | Date: |
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| | |

ESTATE PLANNING AND TAXES

Study Organizer

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

| Types of Trusts | |
|-----------------|--|
| | |
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