

## When should you do an account review with your Account Executive?

- If you have not met with your Account Executive in the last 1-2 years
- If you are within 5 years of using your money
- If you have not started saving for retirement and want to learn more

How often should you review your account? 2:25 minute video

**RETIREMENT 101** 

O How much will I need?

A You may need approximately 80% of your current income.

Let's look at how much you could need in retirement:

 $\times$  80% =

current annual income

estimated amount needed annually in retirement

1"How much to save for a secure retirement," Center for Retirement Research at Boston College (November 2011).

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