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

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**RETIREMENT 101**

**Q.** 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:  

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\text{current annual income} \times 80\% = \text{estimated amount needed annually in retirement}
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