

## Get the most out of your Principal Retire Secure<sup>™</sup> 1 on 1 education meetings.

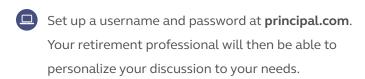
A little prep work can go a long way.



Thanks for signing up for your Retire Secure 1 on 1 education meeting. We're excited you're serious about planning for your future. Now please take a moment to make sure this meeting is as helpful as it can be. These details are important so the Principal Retire Secure retirement professional can help you make a clearer and more realistic plan for retirement.

## Follow these simple steps:

Before your meeting, consider the following steps to help you prepare. If you don't have all of this information that's OK too. We'll still have plenty to discuss.



- Fill out the worksheet on the back of this flier.
- Gather these financial records:
  - Salary or pay stub info
  - Retirement plan statements from previous employers
  - IRA or other savings account statements
  - Social Security statements from ssa.gov
  - Individual insurance policies
  - Your spouse's retirement account statements
  - Estimated rate of return on outside investments

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Save the date for your 1 on 1 education meeting.

Date:

Time:

## Complete this worksheet before your 1 on 1 meeting:

Income		
	Gross annual income (before taxes or bonuses)	Total monthly spendable income (take-home pay and other income)
You		
Your spouse		

Retirement and savings	account sources		
	Employee-sponsored retirement plan(s)	Individual retirement account(s)	Other (mutual funds, CDs, savings)
You			
Your spouse			

Retirement income sour	ces (projected income per y	ear)	
	Social Security (available at ssa.gov)	Defined benefit/pension	Other
You			
Your spouse			

Individual insurance pol	icies	
	Face amount of personal life insurance	Benefit amount of personal disability insurance
You		
Your spouse		

Household budget	
Total monthly expenses	

What	t do you	want t	0	get	out	of your	meetin	ıg?			

Write down your financial priorities, concerns and questions to talk about with your retirement professional.					



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