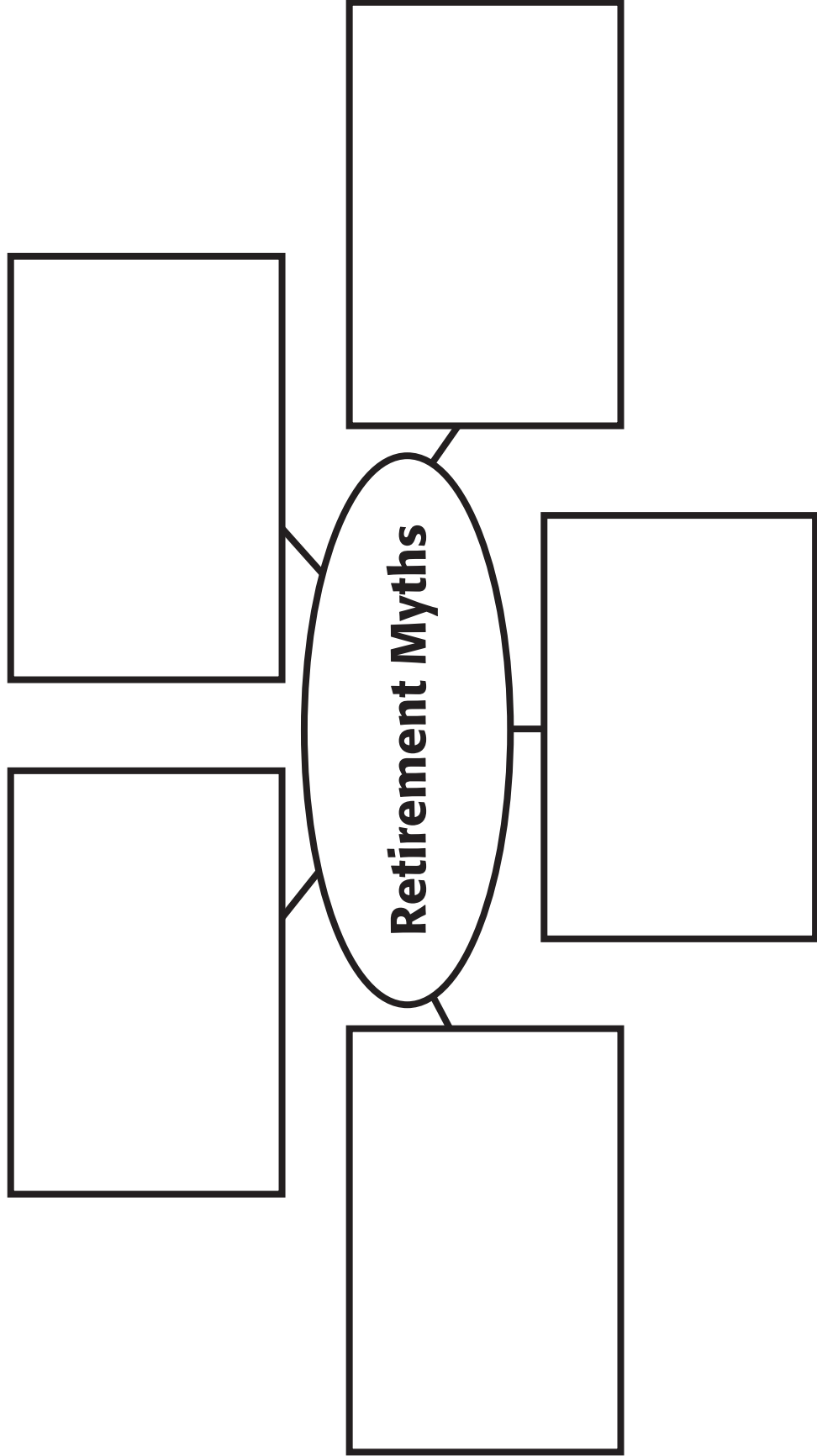


# RETIREMENT PLANNING

## 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 four types of trusts.

