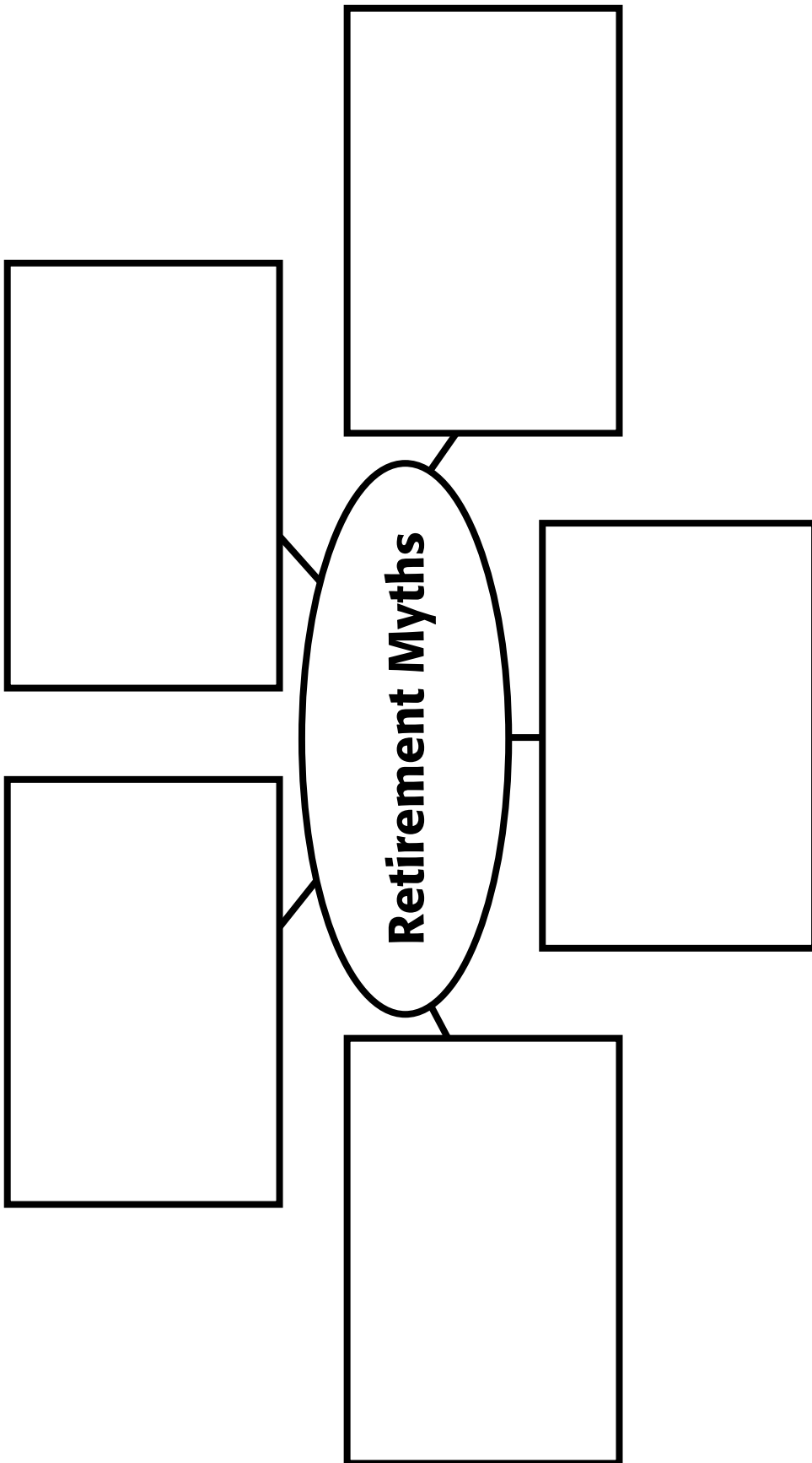


RETIREMENT PLANNING

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.

