

## Personalized Retirement Worksheet

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### Your goals

- Where are you in your retirement journey? **Getting close**
- How do you prefer to grow your retirement savings? **Greater growth opportunity, less predictable**
- When you do retire, would you like your money to provide a regular income payment for life?  
**Yes**
- When do you need to start receiving income? **Now**

### You might want to consider...

#### A fixed-indexed annuity with an income rider

Fixed-indexed annuities offer principal protection and greater growth opportunity that is based, in part, on market performance. You may have the option to add an income rider to receive additional benefits to support your retirement goals.

### Next steps

Speak with a financial professional to determine if an annuity is right for you. Additional questions to consider may include:

- Will an annuity help me achieve my specific goals?
- How does an annuity fit with my investment horizon and risk tolerance?
- What guarantees are included with an annuity?
- What charges are associated with an annuity?
- Other:

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