

Keeping your
dreams on
course.®



Reviewing your **RETIREMENT STRATEGY**



_____ I feel confident that social security will provide a reliable income stream during my retirement.

_____ I have a clear plan for passing my estate to my family at my death with a minimum of taxes.

_____ The charities I care about most will not be affected by my death because they are part of my estate plan.

_____ I need help reviewing my financial risks while retired.

_____ I know exactly how I will contribute to college education for my grandchildren/great-grandchildren.

_____ My retirement income portfolio reflects my risk personality perfectly.

_____ My retirement situation would not change if I or my spouse/partner became sick or hurt.

_____ I feel confident in the level of health insurance I will have in retirement.

_____ I have a clear understanding of my options under Medicare.

_____ I have adequate funds for health care costs.

_____ The health and well-being of my parents or my spouse's parents will not impact my finances during retirement.

_____ My family would be unaffected financially at my death.

_____ I would like to talk with someone about retirement and estate planning strategies.

Lifestyle snap shot

When I retire I plan to:
(Check all that apply)

Play more _____
(fill in the blank)

Move to a new area

Create a family foundation

Continue education

Live closer to family

Relax more

Start a business

Volunteer

Write a book

Travel

Be more physical

Run a marathon

Remodel my home

Mentor others

(other)

Downsize home

Join a service organization

Priority snap shot

What concerns you the most about retirement?

Which areas are important to you as you think about your retirement:
(Check all that apply)

Clarify personal and financial strategies and goals.

Leave a legacy to charity or family.

Examine the financial impact of a death, including immediate cash needs and continuing income needs.

Examine current asset allocation in relation to my risk personality.

Explore various ways I will spend my days.

Consider how my current retirement strategies will meet my objectives.

Build and/or maintain social network.

Evaluate my retirement tax situation.

Discover a new purpose now that I have more time.



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F65190-5 Rev 10-2013 DOFU 10-2013
A03933-1013