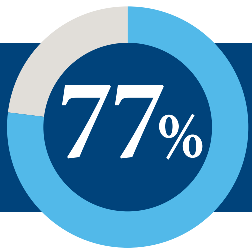
Your retirement confidence can grow — one step at a time.

Money matters. But planning, learning, and reliable income can help turn savings into confidence.



of pre-retirees working with a financial advisor or planner report high preparedness — versus **47%** without one.

BUILD YOUR RETIREMENT READINESS

1
Write it down
Create or update a plan for income, expenses, and assets. A simple written plan is a powerful starting point.

2
Cover the essentials
Estimate housing, food, healthcare, and other must-pay costs. Identify which income sources can reliably cover them.

3
Balance certainty and flexibility
Consider how Social Security, pensions, or annuities can work with savings and investment withdrawals.

4
Ask for guidance
A financial professional can help you compare choices, understand trade-offs, and keep your plan current.

Questions to ask:

Will my reliable income cover basic expenses?

How long could my savings last?

What will I pay in fees?

How much access and control will I keep?

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