



SAVING FOR RETIREMENT WORKSHOP OVERVIEW

Workshop Description

In this workshop, participants will understand the timeline for saving for retirement, how much to save, the different types of retirement accounts, and how to project retirement expenses.

Key Workshop Goals

- Introduce longer-term financial planning
- Understand retirement saving strategies
- Identify the financial considerations unique to living longer

Core Skills Covered

- Balancing assets and liabilities to calculate how to build wealth
- Strategizing how to increase retirement savings
- Developing plans to stabilize expenses

Handouts To Be Discussed

- Retirement Expense Worksheet
- Top 10 Ways to Prepare for Retirement Handout
- Introduction to Investing Handout
- Social Security Fact Sheet

Follow-up Exercise: Participants will update the Retirement Expense Worksheet worksheet, refer to the calculators, or use any tool or method that will help to establish a retirement plan.