



Session 5 Freedom Challenge and Homework

Session 5 - Saving and Investing for the Future | Participant Resource | Version 1.0

Privacy: Keep this resource for your personal use. Do not write account numbers, passwords, Social Security numbers, full birth dates, or other sensitive identifiers.

Choose one

- ☐ Prepare: strengthen one foundation item.
- ☐ Verify: locate a plan statement, contribution rate, holdings, costs, or beneficiaries.
- ☐ Begin: identify an appropriate first step and questions to resolve.
- ☐ Strengthen: improve consistency, diversification, costs, or alignment.

Record it

Action: _____

Complete by: _____ What I learned: _____

Question for Session 6: _____

Education notice: FFES provides general financial education, not individualized investment, tax, legal, insurance, credit, mortgage, Social Security, Medicare, pension, or estate-planning advice. Rules and individual circumstances differ and can change.