



## Session 6 Freedom Challenge and Homework

Session 6 - Retirement Readiness and Income Planning | 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 to three actions

- ☐ Locate Social Security or pension estimates.
- ☐ List expected retirement-income sources.
- ☐ Review workplace-plan and IRA account types.
- ☐ Identify a tax, RMD, Roth, Medicare, or IRMAA question to verify.
- ☐ Review beneficiaries and household instructions.
- ☐ Schedule an appropriate professional review.

### Plan

Action: \_\_\_\_\_ Due: \_\_\_\_\_

Action: \_\_\_\_\_ Due: \_\_\_\_\_

Action: \_\_\_\_\_ Due: \_\_\_\_\_

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