



Instructions for Participant Checklist

Knowing your retirement plan numbers is a good way to make sure you will have enough money in the future to do what you want, like buy a house, help your kids with college, start your own business or retire. The *Know Your Numbers* checklist contains important information you should know about your retirement plan and the income you may need in retirement.

To find the information to fill in the spaces provided, look at what is offered by the provider that holds your account: your account statement, the provider's website where you log in to see your account balance, calculators to determine how much you may need in retirement, etc.

Your employer may also have resources for you to get the information and can help you with things like the match amount (if offered) and the maximum amount you can contribute.

To learn about what you may get from Medicare and Social Security, check out the governmental websites: <https://www.medicare.gov> and <https://www.ssa.gov>.

The website <https://www.mymoney.gov/> has lots of information that may be helpful to you.

Whether you fill every space or not, consider saving your checklist and redoing it in a year, and perhaps each year thereafter, to make sure you know if you are on the way to a healthy financial future.