



## Back-to-school for Retirement Plans

### School is now in session!

Let's check if you're preparing for retirement and review the following items we've listed below.



#### Contribute to your Retirement Plan

It is imperative to keep track of your retirement plan and set aside a percentage of your income. It's recommended to save at least 10% of your income for an enjoyable retirement.



#### Assign or Update Beneficiaries

A critical part of having a retirement plan is to assign the accounts beneficiaries. It's important to periodically check or update the account after major life events like the death of a spouse, marriage, divorce, etc.



#### Familiarize yourself with your Company Offerings

Does your company offer long-term care insurance and/or healthcare plans? It's a good idea to be familiar with their benefits and frequently check to see what new perks they offer.



#### Be Aware of Cyber Security

Cyber-attacks are common and should be recognized by retirement plan participants to ensure their information is safe. It's essential to frequently update your passwords and educate yourself on cyber security.

**For assistance, please contact your financial professional, Kevin Donahue AIF®, CRPC® at [kevin@risensonfinancial.com](mailto:kevin@risensonfinancial.com) or call 813.512.2746.**

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To remove yourself from this list, or to add a colleague, please email us at [kevin@risensonfinancial.com](mailto:kevin@risensonfinancial.com) or call 813-512-2746

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For more information on retirement tips, contact your plan advisor,  
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