

Financial Wellness Update



July 2020

"I reviewed your investments and set you up for early retirement. On your last day, you can afford to leave at 4:30 instead of 5:00."



Summer Checklist

We know you're ready for summer! But, how's your retirement plan doing?

Summer can serve as a preview of your retirement — long days in the sun and spending time with your loved ones! So, what better time to do a routine check-up on your retirement plan! Protect your loved ones and ensure you are keeping up to date with your retirement plan with our summer checklist!

Statistics show nearly 20% of Americans are not satisfied with their savings. It's time to give serious consideration to your saving plan to be able to live comfortably once you retire.



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- Update or Assign Beneficiaries**
Did you experience a major life change this year, such as marriage, divorce, birth or death? It's important to consider updating your beneficiaries when you go through a major life change.
 - Review Cyber Security Best Practices**
Retirement plans are a major target for cyber attacks. Retirement plan participants often have weak passwords and can unknowingly fall for phishing schemes. It's important to educate yourself on cyber security best practices to ensure you are keeping your information and assets safe.
 - Remember Sunscreen!**
Wearing sunscreen reduces your risk of developing skin cancer, it keeps your skin looking younger and protects you from UVB rays. What other reasons do you need to wear it?

Questions about saving for the future? Contact **Greg Tedone** or **Chris Hoffarth**.

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