SUCCESS DOESN'T JUST HAPPEN, IT’S PLANNED FOR
Established in Your Career

40s

- Develop specific retirement savings goals
- Check that the names of beneficiaries/heirs listed on your will, life insurance, financial accounts, and retirement accounts are up to date
- Assess how your 401(k) plan or IRA assets are invested as your investment objectives may have changed
- Review life insurance policies to ensure adequate coverage
- Evaluate your education funding plan based on expected college costs

If possible, keep part of your savings outside of an employer-sponsored retirement plan. While your employer’s plan is generally a great place to start, there are a variety of retirement savings vehicles that may serve as supplemental options.