WHAT YOUR RETIREMENT INCOME SPECIALIST NEEDS TO KNOW

Write down your retirement expenses, income and savings on this worksheet. Having this information in one place will allow you to create a plan and assess your current retirement goals and risks. It will be a good starting point between you and your financial professional to help build your retirement income strategy.

If you have any questions, call 800-531-3392 today.

RETIREMENT INCOME

Social Security	________________
Pension	________________
Part-time Employment	________________
Other Regular Income (i.e. rental property income)	________________

RETIREMENT SAVINGS

Cash	________________
401(k)s	________________
IRA	________________
Stocks	________________
Bonds	________________
Other Accounts	________________

RETIREMENT EXPENSES

Property Taxes	________________
Mortgage	________________
Food	________________
Clothing	________________
Insurance Premiums	________________
Out-of-pocket Health Costs	________________
Prescription Drugs	________________
Transportation	________________
Other Expenses	________________
Other Essentials You Want To Plan For	________________

Anything can be an essential if it will help you live your best life in retirement. Dining out, gifting (both charitable and to your children), vacations or taking up new hobbies may all be essentials to YOUR retirement and it's important to plan for them if they are.

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Questions for your USAA Retirement Income Specialist

It's always best to get detailed, personalized answers from a professional. Here are some questions to ask your USAA Retirement Specialist. These may not be the only questions you have, but they will help you get a better understanding of our offerings.

1. What is USAA's point of view with respect to retirement income planning?

2. What risks can derail my plans for what is important to me?

3. How can I use protected income to live my best life in retirement?

4. How do I know if an income annuity is right for me?

5. What value does an income annuity provide in retirement?

6. When would I start receiving income?

7. Can I change my mind after I fund my income annuity?

8. Are there any fees I should know about?

After all is said and done, we hope you'll decide to let USAA help make your retirement easier. If you still have any questions, please reach out to us at any time.