



Taking the Mystery Out of Retirement

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Resources

1. Great website that has a wealth of information about retirement:
www.finra.org/investors
2. Learn more about the various types of investments:
www.finra.org/investors/types-investments
3. The Fund Analyzer offers information and analysis on over 18,000 mutual funds, Exchange Traded Funds (ETFs) and Exchange Traded Notes (ETNs). This tool estimates the value of the funds and impact of fees and expenses on your investment and also allows you the ability to look up applicable fees and available discounts for funds:
<http://apps.finra.org/fundalyzer/1/fa.aspx>
4. The Ballpark E\$timate is an easy-to-use, interactive tool that helps you quickly identify approximately how much you need to save to fund a comfortable retirement.
www.choosetosave.org/ballpark/
5. 2017 annual limits relating to financial planning and investing:
www.cffpinfo.com/download/annual_limits/2017_Annual_Limits.pdf
6. Investing Risk Tolerance Worksheet
www.msuextension.org/solidfinances/resources/2016/risktoleranceworksheet.pdf