



## *Withdrawal Strategies*

February 14, 2018

### **Resources**

You've done it! You did what you were supposed to do and saved for retirement over the years. The time for retirement is fast approaching. There are a lot of questions, not the least of which is, "Do I have enough?" and "Will my family and I be ok?" Put your mind at ease. Regardless of the size of your nest egg this session will help you crunch your numbers, determine a reasonable date for retirement, identify how much you will have to live on during retirement, and how to make your money last a little longer than you thought.

#### **Online Resources**

- Investor.gov <https://www.investor.gov/introduction-investing/basics/investment-products/annuities>
- Penn State <https://hr.psu.edu/benefits/retirement/annuities-mutual-funds-comparison>
- Baylor University [http://agrifecdn.tamu.edu/financialplanning/files/2014/12/Reichenstein\\_Withdrawal\\_Strategies.pdf](http://agrifecdn.tamu.edu/financialplanning/files/2014/12/Reichenstein_Withdrawal_Strategies.pdf)
- Stanford University <http://longevity.stanford.edu/wp-content/uploads/2017/11/Optimizing-Retirement-Income-Solutions-November-2017-SCL-Version.pdf>
- TIAA <https://www.tiaa.org/public/offer/insights/preparing-for-retirement/finances/withdrawal-strategies>