

Your retirement planning checklist

Use this checklist to help determine the next step in your plan for retirement

☐ Get enrolled.

Register online at workplace.schwab.com to access your account and view important information about your plan.

☐ Understand contribution types, and set your savings rate.

Depending on your plan, there may be additional opportunities to save. Review your contribution types, and determine how much you want to save each month.

☐ Select an approach to investing.

Think about your level of investing knowledge, what level of risk you're comfortable with, and how hands-on you want to be. Understand the different investment options available through your plan, and decide how to invest your contributions in ways that align with your retirement goals.

☐ Add beneficiaries to your account.

Ensure your account passes directly to whoever you designate.

☐ Evaluate your rollover options.

Consider consolidating your retirement accounts for simplified management.

☐ Get help.

Need assistance?

Schwab Retirement Plan Services is here to help. Call us at 1-800-724-7526.

Plan for your retirement today by logging in to your retirement plan account at workplace.schwab.com.



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