



## **2020 401k Checklist Worksheet**

The days of receiving a corporate pension are going away. Today, more individuals are responsible for their own retirement income. Getting the most performance out of your workplace retirement account (401a, 401(k) 403(b), 457, TSP) is more important than ever.

**How much would you like to have saved in your workplace retirement account for your retirement?**

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**How do you feel the chances are that your goal above is achievable? (circle the best answer below)**

- Unlikely
- Not sure
- Likely

**List 3 ways your life during retirement might improve if you were to meet or exceed your account value.**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**List the 3 simple habits successful 401k investors develop to increase the chances of optimizing the performance of their 401k.**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

**List the 1 simple habit smart 401k investors do 4 times per year to potentially optimize the 401(k) performance (in good and bad times).**

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