



Is it Time for Your Account Review?

When should you meet with your Account Executive to review your Ohio DC account? The answer should not be...the day before you retire. You should regularly review your account before and after retirement. Here are a few suggestions as to when you should schedule an account review:

- If you have not met with your Account Executive in the last two years.
- If you have undergone any life events, such as marriage, childbirth, or divorce.
- If you are within 5 years of taking distributions.

You can also schedule an appointment if you have not started saving for retirement and want to learn more about how to save. Meeting with an Account Executive for an account review can help you review your retirement goals, future income needs, and tolerance for investment risk.

Q: How much will I need?

A: You may need approximately 80% of your current income.

Let's look at
how much you
could need in
retirement:

$$\text{_____} \times 80\% = \text{_____}$$

current annual income estimated amount needed
annually in retirement

Make it a priority to schedule an appointment every one or two years to help ensure you are on pace to meet your retirement goals. For additional insight about the benefits of reviewing your account with your Account Executive, please watch this short [video](#).

Schedule an appointment with your [Account Executive](#) today!