



Kim Olson, Director, Retirement Plans



# LifeStage Retirement Income



What is your dream for retirement?

# What is a participant's dream for retirement?

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What is your dream for retirement?

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Uncommon themes:

- Manage my finances
- Become an investment professional
- Continue working



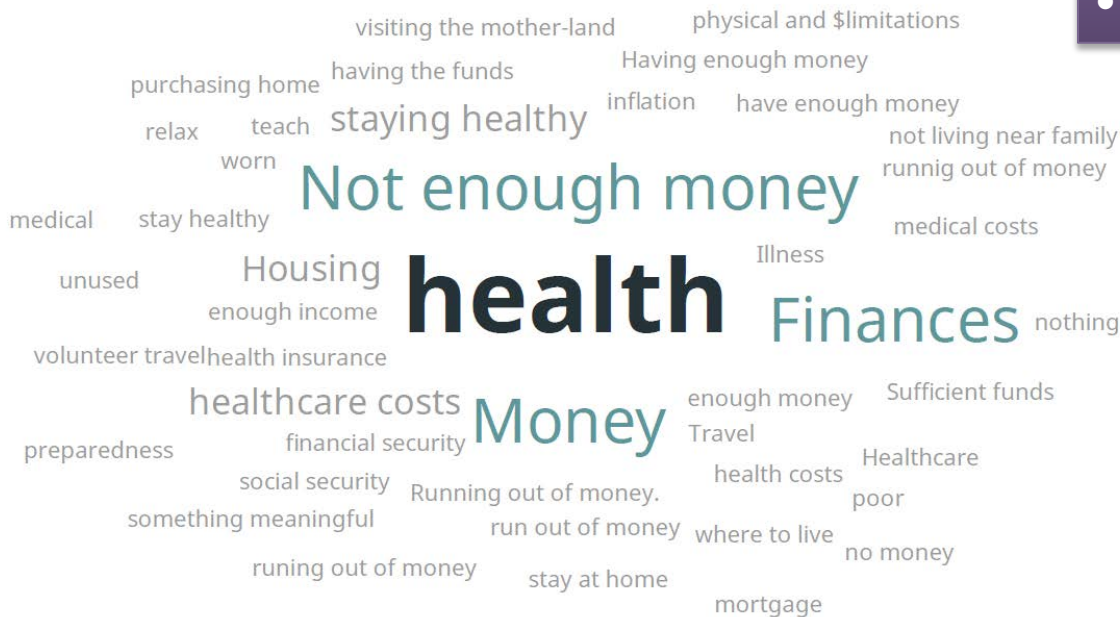
What is your biggest worry about retirement?

# What is a participant's biggest worry about retirement?

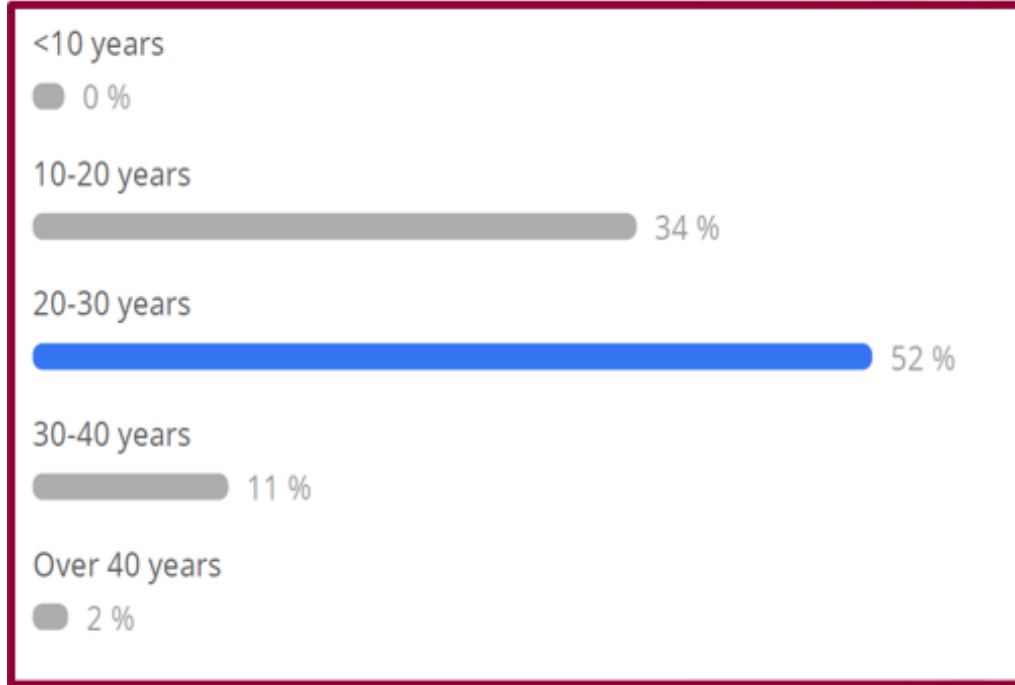
What is your biggest worry about retirement?

2 3 4

- Finances
- Health costs
- Housing

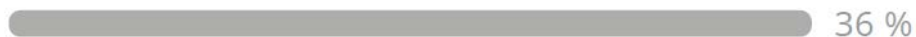


# Participants think they will live



# How confident are you about managing your investments?

Not at all confident



Somewhat confident



Very confident



# Who do you want to manage your retirement savings?

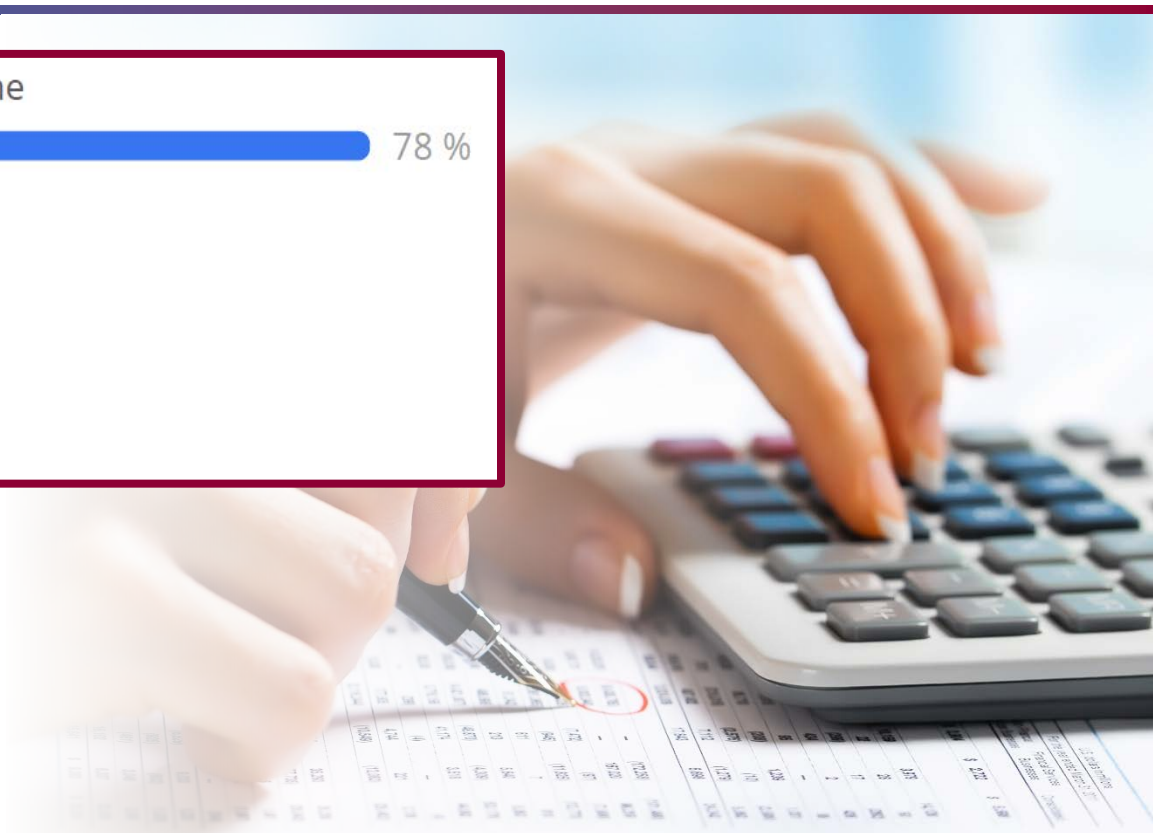
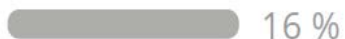
I trust Wespath and/or EY to do it for me



I will do it myself



I will hire a financial advisor





# LifeStage Retirement Income

- More than 3,000 participants use it
- Up and running for more than 10 years
- New features coming Spring 2022:
  - Social Security Bridge
  - Longevity Income Protection



# For the Intends-to-Retire Class of 2022

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Participants will be able to model their retirement income in [benefitsaccess.org](https://benefitsaccess.org)

- Entering your Social Security estimate (if applicable)
- Determining a percentage of assets to include in the program
- Individually assess if each feature fits their circumstances



Insert LSRI video led by Martin Bauer

# Use Your Wespath Resources

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**EY Financial Planning Services 1-800-360-2539**

**Wespath Participant Solutions 1-800-851-2201**

