

Worksheet 7

My Retirement Plan

Whether you have a 401(k) at work or open your own IRA, start contributing as much as you reasonably can — and grow it from there.

Does my job offer a 401(k)? (Yes / No) _____

Employer match is up to (%): _____

I currently contribute (%): _____

Contribution needed for the full match (%): _____

If no 401(k), I will open an IRA at: _____

My plan to raise contributions over time: _____