

# Understanding Your Retirement Evaluation

## Your Retirement Evaluation

Current snapshot for how you're doing across three areas:

- Investments
- Savings
- Retirement income

Stoplight methodology highlights areas needing improvement

## Next Steps

1. Review your Retirement Evaluation
2. Review areas that should be improved
3. Determine which help option is right for you
4. Review your plan periodically



Presented by  
**Edelman Financial Engines**

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Available at any time

<http://CatBenefitsCenter.com>

## Three ways to get help:

### Target-Date Funds

- Simple, single-fund, investment solution
- Professionally managed, diversified
- Becomes more conservative over time automatically
- Not customized

### Online Advice

- Access tools and techniques used by some of the world's largest investment managers
- Get investment recommendations
- You manage portfolio
- No additional cost

### Professional Management

- Get peace of mind having a team of experts look after your account
- We'll create a personalized plan and handle all your transactions
- Fee-based service

Benefits Website: <http://CatBenefitsCenter.com>

Benefits Center: 1-877-228-4010 Mon-Fri, 8AM – 6PM CT

Investment Advisors: 1-877-228-4010 and select "Investment advice" Mon-Fri 8AM – 8PM CT

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