

# Financial Workshop

## ACTION STEPS



1

Log into your Vanguard account – make sure it is active

2

Find your last quarterly statement – note your current account balance, and your rate of deferral

3

Review and update (if needed) your beneficiary designation  
**\*Beneficiary designation will be verified by THR\***

4

Find whether you are on track for retirement using  
**Vanguard's Retirement Income Calculator**

5

Find out if your asset mix is on track using  
**Vanguard's Investor Questionnaire.**

6

Learn more about your Social Security benefit by creating an account and looking at your current benefit - **ssa.gov**

When all above steps are complete you may submit for Financial Workshop points in the Livewell Annual Incentive Campaign activities on the platform.



Questions? Email [wellness@wkkf.org](mailto:wellness@wkkf.org)