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## in — TO DO LIST

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**1. My current financial position and needs are:**

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**2. My financial and retirement goals are: —** Consider the timeframe in which you want to retire, and your planned retirement income and expenditure.

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**3. Plan my super budget to achieve my goals:** · Your retirement income might need to last another 20-30 years, and your financial situation is likely to change in retirement. Start planning your budget now.

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**4. My long-term 'risk profile' is:** The super investment options you select should be determined by a number of factors. This includes risk tolerance, investment timeframe and income needs.

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**5. Investment strategies and options to manage my retirement.** Investment returns and income drawn determine how long your funds will last in retirement.

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### Good to know:

Your Vision Super financial planner can assist you to identify super strategies and options that best suit your retirement income needs. Bring this completed list along to your retirement planning session to discuss your retirement income needs and wants with your financial planner.

Call us on **(03) 9911 3222 (regional 1300 300 820)** or fill in our Retirement Planning online form if you'd like to be contacted by a financial planner.