

What's Your Money Mindset?

Select the 5 statements that most reflect your priorities for retirement income:

1. Income is guaranteed for life
2. Income is adjusted for inflation
3. Income amount will remain the same throughout retirement
4. Income amount has the potential for investment growth
5. Income amount can be changed as needs change
6. Income can be converted into a lump sum
7. Initial investment amount is preserved
8. Ability to make occasional withdrawals in excess of regular payment
9. Returns on investments are guaranteed
10. Control over how investments are managed and/or allocated

(1 of 2)



Money Mindset Profiles

Statements you deem as most important will reveal your most likely Money Mindset

Guarantee
Seeker

1. Income is guaranteed for life
2. Income is adjusted for inflation
3. Income amount will remain the same throughout retirement

Asset
Protector

4. Income can be converted into a lump sum
5. Initial investment amount is preserved
6. Returns on investments are guaranteed

Estate
Planner

7. Ability to make occasional withdrawals in excess of regular payment
8. Control over how investments are managed and/or allocated
9. Income amount has the potential for investment growth
10. Income amount can be changed as needs change

(2 of 2)