

Retirement Resources

Courtesy of Bob Schulz, “The Retirement Guy”

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- To Create a Retirement Budget**
 - fidelity.com – In the “Retirement Income Planner” section
 - kiplinger.com/tools/budget
- Financial Planning Resources**
 - vanguard.com/us/whatweoffer/advice/financialplanningservices
 - betterment.com
 - wealthfront.com
- Retirement Calculators**
 - aarp.org – “Money & Work”, “Financial Planning & Retirement”, “Retirement Planning Calculator”
 - fidelity.com – “MyPlan Calculator” or “Retirement Quick Check”
 - FIREcalc.com – Motley Fool’s favorite: <http://www.free-online-calculator-use.com/calculate-retirement-savings.html>
- Roth Conversion Calculators**
 - wsj.com/RothIRAWorksheet
 - RothRetirement.com
 - Personal.vanguard.com/us/RothConversion
- To Evaluate Stocks/Bonds/Mutual Funds**
 - morningstar.com
 - Insurance Information Institute (Annuities): iii.org/insurance_topics/financial_planning
- To Check Annuity/Insurance Companies’ Financial Strength**
 - Insure.com
- Stock Market Simulation**
 - vse.marketwatch.com
- To Improve Your Bottom Line**
 - money.cnn.com/pf/retirement/index.html
 - moneychimp.com
 - getrichslowly.org
 - investopedia.com (An investing dictionary)
- To Track All Your Money in One Place**
 - moneycenter.yodlee.com
 - mint.com
- To Research Annuities**
 - immediateannuities.com
- Reverse Mortgage Information**
 - rmaarp.com
 - mtgprofessor.com
- Sources for vetting your financial adviser.**
 - Financial Industry Regulatory Agency: www.finra.org
 - For Firms Regulated by SEC (over 25 million): www.adviserinfo.sec.gov
 - For Advisers Education and Work History
 - Certified Financial Planner Board of Standards Inc.: www.cfp.net
 - Financial Planning Association: www.fpanet.org

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