

# Your retirement planning checklist

charles  
SCHWAB

*Own your tomorrow.*

There's a lot to know when it comes to planning your retirement. We know it can seem overwhelming and confusing sometimes. To try to make things easier, we've developed this list to help you take your next step.

## □ Get enrolled.

Register online at [workplace.schwab.com](https://workplace.schwab.com) to access your account and view important information about your plan.

## □ Understand contribution types, and set your savings rate.

Depending on your plan, there may be additional opportunities to save. Review your contribution types, and determine how much you want to save each month.

## □ Choose your investment approach.

Think about your current level of investing knowledge, what level of risk you're comfortable with, and how hands-on you want to be.

## □ Select your investment options.

Understand the different investment options available through your plan, and decide how to invest your contributions in ways that align with your retirement goals.

## □ Explore the guide.

See how various parts of your financial picture may fit together, and get help creating a personalized plan with suggested next steps with My Financial Guide. Visit [workplace.schwab.com/myfinancialguide](https://workplace.schwab.com/myfinancialguide) and log in to your retirement plan account to get started.

---

Plan for your retirement today by logging in to your retirement plan account at [workplace.schwab.com](https://workplace.schwab.com). Need assistance? Schwab Retirement Plan Services is here to help. Call us at **1-800-724-7526**, Monday through Friday, from 8 a.m. to 10 p.m. ET.



The Charles Schwab Corporation provides services to retirement and other benefit plans and participants through its separate but affiliated companies and subsidiaries: Charles Schwab Trust Bank; Charles Schwab Bank, SSB; Charles Schwab & Co., Inc.; and Schwab Retirement Plan Services, Inc. Trust, custody, and deposit products and services are available through Charles Schwab Trust Bank and Charles Schwab Bank, SSB, Members of FDIC. Brokerage products and services are offered by Charles Schwab & Co., Inc. (Member SIPC, [sipc.org](http://sipc.org)).

Schwab Retirement Plan Services, Inc. provides recordkeeping and related services with respect to retirement plans and has provided this communication to you as part of the recordkeeping services it provides to the plan.

©2022 Schwab Retirement Plan Services, Inc. All rights reserved.

AHA (0122-2DGY) MKT117655-00 (03/22)

00272967



*Own your tomorrow.*