

CREATE A PENSION

YAY | MAYBE | NAY

READING BOOKMARK

INCOME FOUNDATIONS

Mark your first reaction to each subject.

YAY explore	MAYBE ask	NAY not now
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BOOK SUBJECT	Y	M	N
Social Security	☐	☐	☐
Employer or government pension	☐	☐	☐
Cash, savings, or money market	☐	☐	☐
Certificates of deposit (CDs)	☐	☐	☐
U.S. Treasury securities	☐	☐	☐

MY TOP MAYBE:

For educational use only.

rootsandwealth.com/create-a-pension



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MARKETS + PROPERTY

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YAY explore	MAYBE ask	NAY not now
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BOOK SUBJECT	Y	M	N
Bonds or bond funds	☐	☐	☐
Dividend-paying investments	☐	☐	☐
Portfolio withdrawals / the 4% approach	☐	☐	☐
Rental real estate	☐	☐	☐
Real estate investment trusts (REITs)	☐	☐	☐

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ANNUITIES + HOME EQUITY

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BOOK SUBJECT	Y	M	N
Multi-year guaranteed annuity (MYGA)	☐	☐	☐
Immediate income annuity (SPIA)	☐	☐	☐
Deferred income annuity (DIA or QLAC)	☐	☐	☐
Fixed indexed annuity with an income rider	☐	☐	☐
Home equity or a reverse mortgage	☐	☐	☐

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