

BACK TO SCHOOL

Pop Quiz: Have you done your homework on retirement?

1

In order to maintain living standards in retirement, what percent of annual income do financial professionals think people should save?

- A. About 3%
- B. About 6%
- C. About 9%
- D. About 12%
- E. About 15%

2

If an investor could set aside \$50 each month for retirement, how much might that end up becoming in 25 years, including interest if it grew at the historical stock market average?

- A. About \$15,000
- B. About \$30,000
- C. About \$40,000
- D. About \$50,000
- E. More than \$60,000

3

Roughly how much do many financial professionals suggest people think about saving by the time they retire?

- A. About 2-3 times the amount of your last income
- B. About 4-5 times the amount of your last income
- C. About 6-7 times the amount of your last income
- D. About 8-9 times the amount of your last income
- E. About 10-12 times the amount of your last income

4

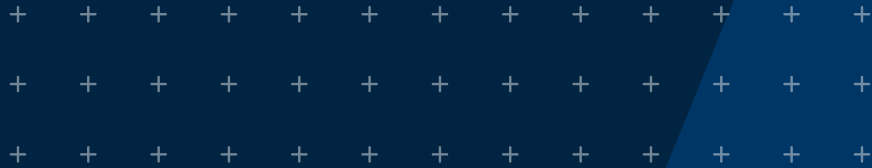
Which of the following do you think is the single biggest expense for most people in retirement?

- A. Housing
- B. Health Care
- C. Taxes
- D. Food
- E. Discretionary expenses

Check your answers at the bottom right corner of the page. Did you miss any of these questions? Are you still unsure about any of these topics? If so, don't let this pop quiz burst your bubble!

Contact an IMA Wealth Advisor at 877.305.1864 or wealth@imacorp.com and schedule an appointment!

Let's Connect



WICHITA

430 E Douglas Ave, #400
Wichita, KS 67202
Phone: 316.266.6574
Toll Free: 877.305.1864

DENVER

1705 17th Street, #100
Denver, CO 80202
Phone: 303.615.7600
Toll Free: 800.813.0203

DALLAS

14221 North Dallas Parkway, #700
Dallas, TX 75254
Phone: 972.458.8700

For assistance with your retirement needs, contact an IMA Wealth, Inc. advisor at wealth@imacorp.com or call 877.305.1864

The material presented was created by a non-affiliated outside vendor (or third party).

The statements and opinions expressed are those of the individual and not necessarily those of IMA Wealth, Inc. ("IMAW"). Material presented herein is gathered from what we believe are reliable sources and should not be regarded as a complete analysis of these subjects. IMAW cannot guarantee the accuracy or completeness of any statements or data. All content is for general information purposes only and does not take into consideration your individual circumstances, financial situation or needs, nor does it present a personalized recommendation to you. Content is not intended to provide legal, accounting, tax, ERISA, or investment advice.

Investment advisory services are offered through IMA Wealth, Inc., an investment advisor registered with the Securities and Exchange Commission ("SEC"). IMA Wealth, Inc. is also an SEC registered securities broker-dealer, Member FINRA, and an insurance agency. This is not a solicitation or offer to sell investment advisory services, securities, or insurance except in states where we are registered or where an exemption or exclusion from such registration exists. Investing in securities involves risk, including the possible loss of principal.

CT-S-IMAW-082222

IMAWEALTH.COM