



Facilitate a Route Your Retirement Fair For Working Adults of All Ages We'll Help!

Participant Experience:

The ***Route Your Retirement Fair*** is an interactive simulation experience that will have participants thinking ahead about the type of lifestyle they would like to pursue in retirement and then linking their projected lifestyle to their financial plan. Whether just starting out in a career or approaching retirement, the ***Route Your Retirement Fair*** will help participants discover what they can do now, today, to improve their financial future.

During the fair, participants visit seven lifestyle stations to make an assessment about personal goals for each aspect of their retirement lifestyle. Individual choices will show how much will likely be spent in each area in retirement. After visiting each station, participants discover how to link their lifestyle choices to their retirement planning and saving.

Participants calculate a personal “**lifestyle number**” to help determine retirement projected spending projections and be given resources for additional information. Participants are encouraged to obtain detailed advice from a retirement planner to help assess whether they are on track to be able to finance the lifestyle options they chose.

Facilitation Requirements:

- Host credit union(s) and 1-2 lead coordinators
- Facility for event with seating and room for seven lifestyle stations
- 8 credit union/community volunteers, more for larger groups of participants
- Optional investment advisor participation

MCUF Makes it Easy!

- Training and complete operating instructions
- Signage and station materials
- Participant worksheets and handouts
- Presentation PowerPoint with presenter instructions
- Communication templates
- MCUF funding is available for other fair costs

See what the ***Route Your Retirement Fair*** is all about: <https://www.youtube.com/watch?v=ixCiNUEdSTo>

Ready? Need More Information? Contact Beth Troost at 734-793-3453/ beth.troost@mcuf.org

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