

Interview

Pick an adult in your life to ask about their current investments and retirement plans.

1. Name of person you are interviewing and relation to you: _____

2. Do you have any retirement savings plans started? If so, what kind? _____

3. What kind (if any) investments do you have? _____

4. Did you have a 529 college savings account? Do you know if there is one set up for me? _____

5. What level of risk in your investments do you feel comfortable with? _____

6. What is one piece of advice you would give me about saving for my future? _____

