

4-in-10 Boomers have a formal written financial plan...

... and the majority say they are better off financially because of it

■ Boomers (n=3226)

Have a Formal Financial Plan? Would you say that you ...? Are better off financially 71% because of your financial plan Yes 42% Are no better or worse off than you would have been if you 23% didn't have a financial plan No 56% Are probably worse off because 2% of your financial plan

QB1Anew. Do you have a formal written financial plan? Base: All respondents QB1Bnew. Would you say that you... Base: Have a financial plan



At some point(s) over time, just ignored your plan

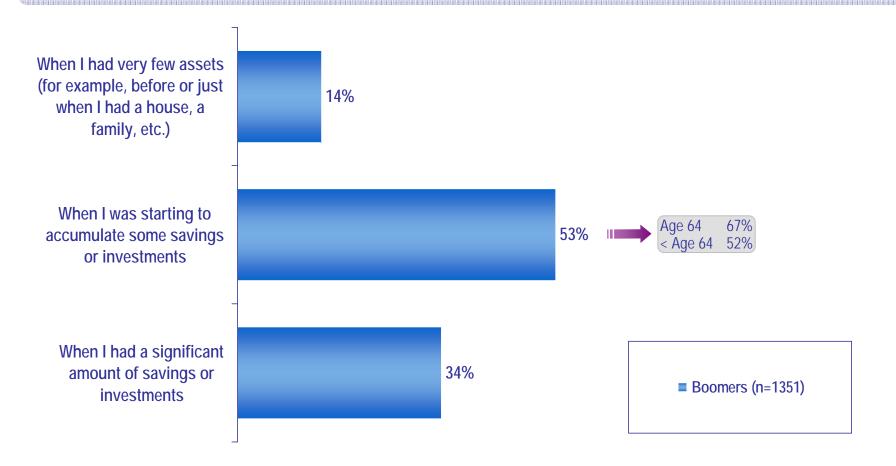
Don't know

■ Boomers (n=1351)



Half of those Boomers with a formal written financial plan developed their plan once they started to accumulate assets

-Two thirds of 64 year old Boomers first developed their financial plan once they started to accumulate assets



QB1Cnew. When did you first develop your formal written financial plan? Base: Have a financial plan

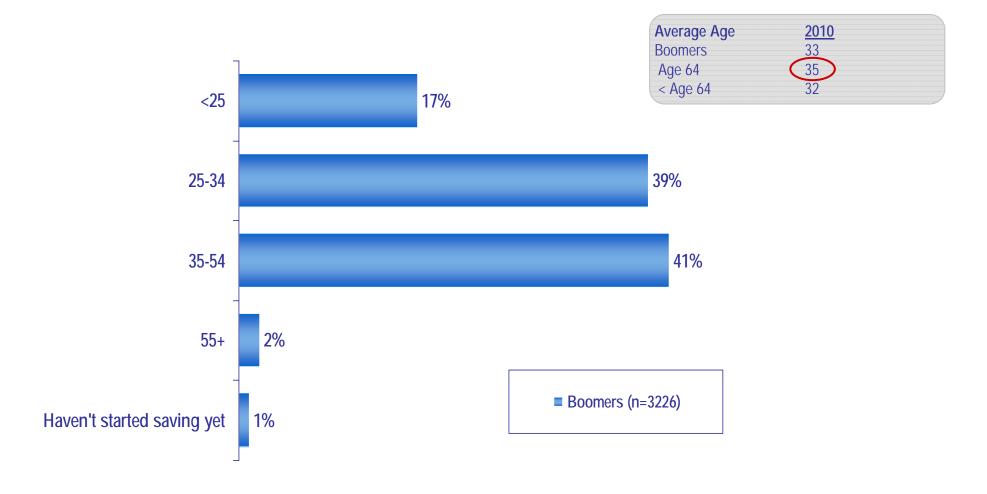


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On average, Boomers started saving for retirement in their early 30s

- 64 year olds Boomers started saving, on average, at an older age than younger Boomers

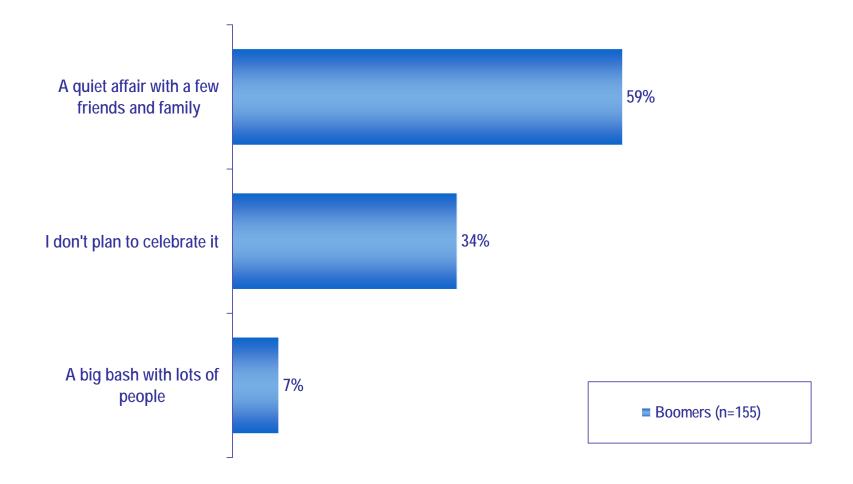


QB2d. At what age did you begin saving for retirement? Base: All respondents





The majority of Boomer 64 year olds plan to celebrate their 65th birthday quietly with family and friends

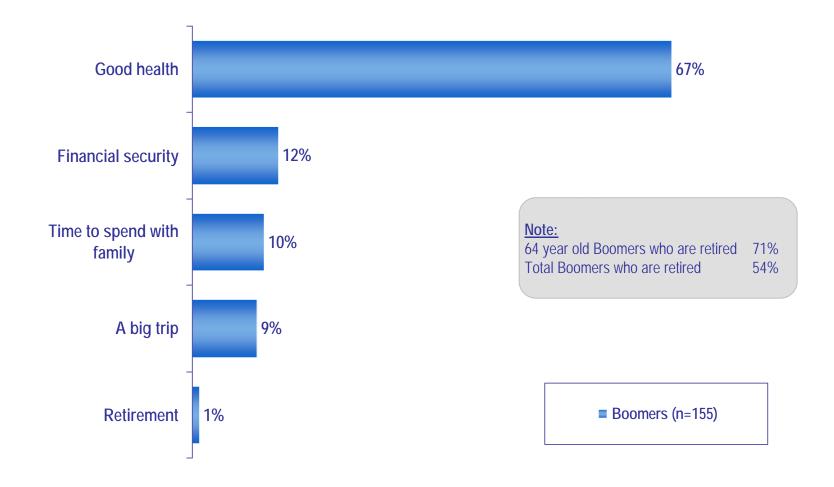


QF8new1. How do you plan to celebrate your 65th birthday? Base: 64 year olds





Two-thirds of Boomer 64 year olds say the best gift for their 65th birthday would be good health



QF9new1. What would you consider to be the best gift for your 65th birthday? Base: 64 year olds

