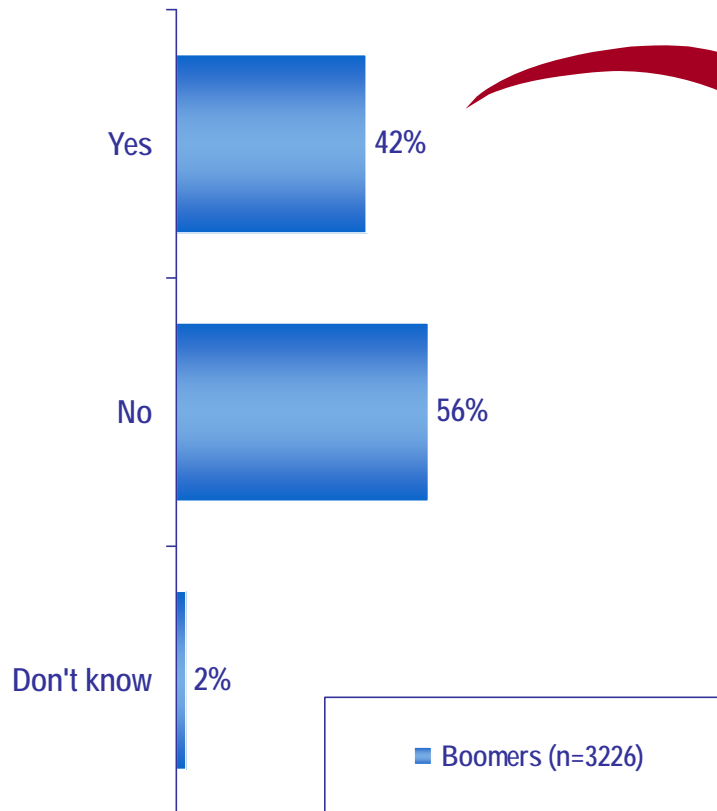




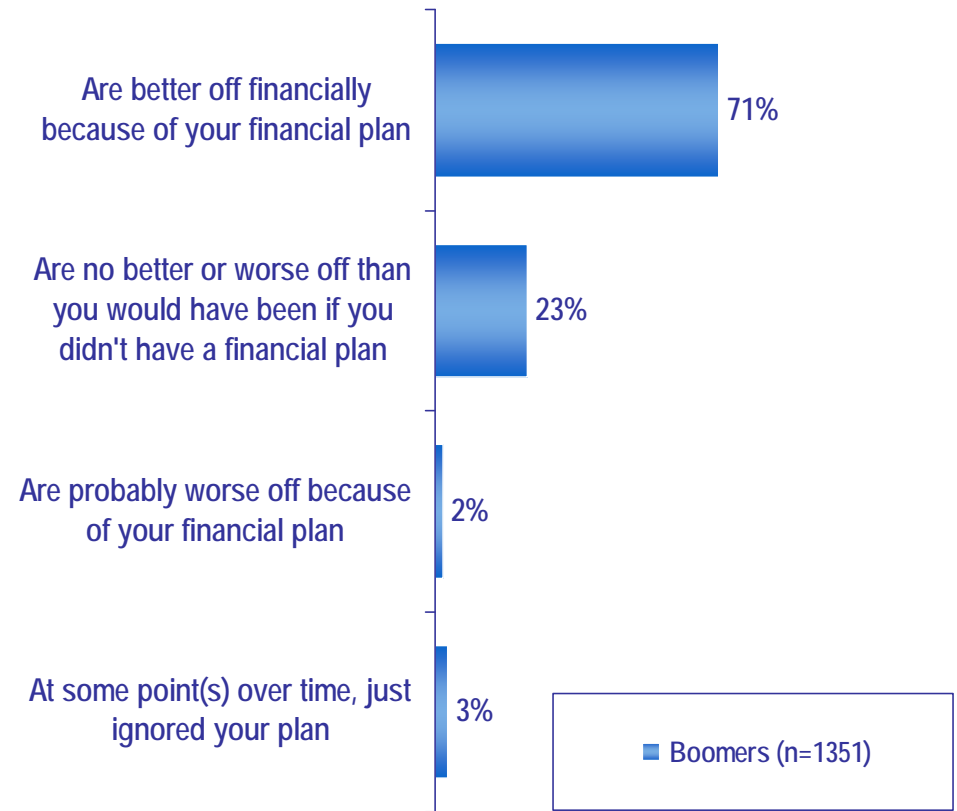
4-in-10 Boomers have a formal written financial plan...

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

Have a Formal Financial Plan?



Would you say that you...?

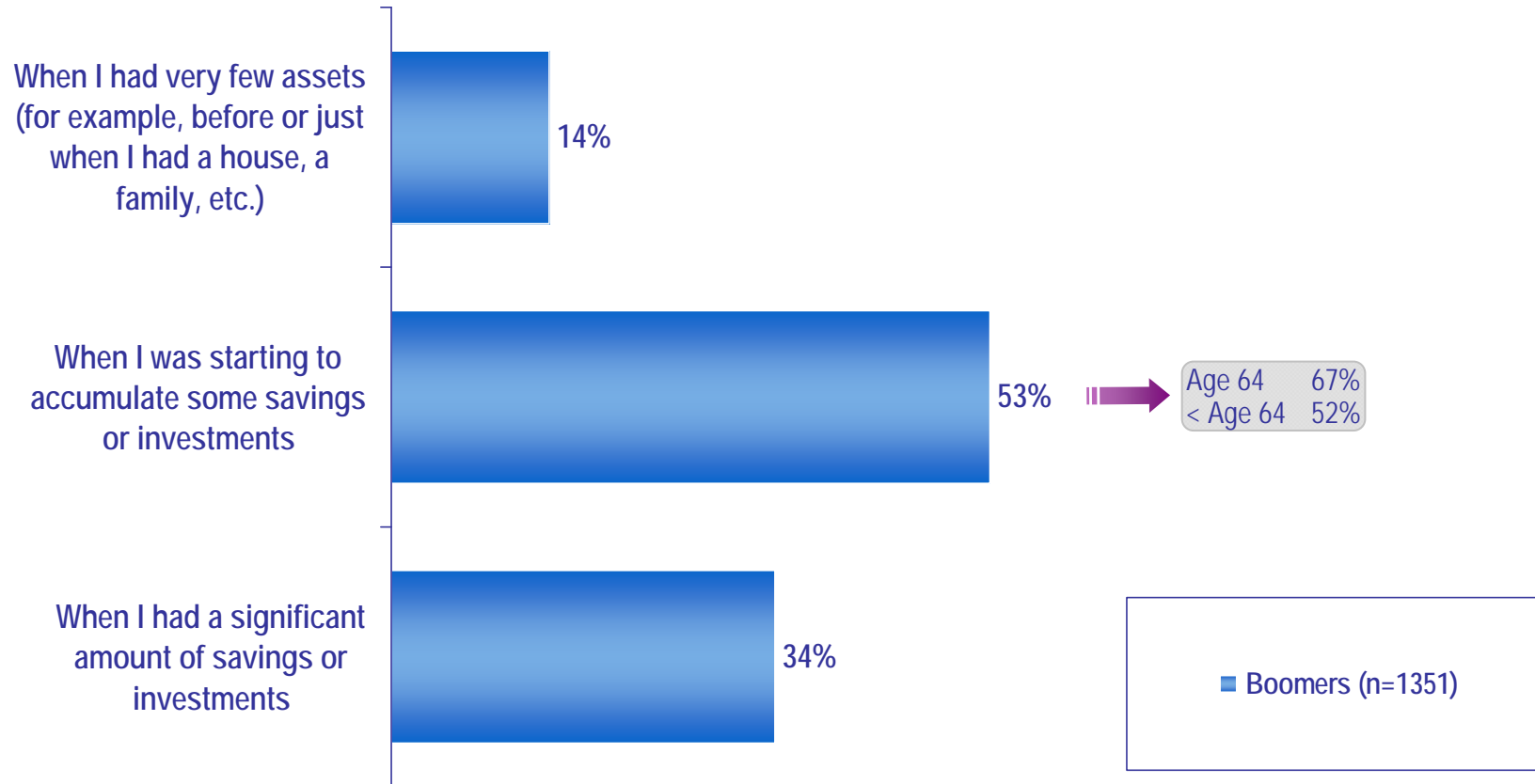


QB1Anew. Do you have a formal written financial plan? Base: All respondents
QB1Bnew. Would you say that you... Base: Have a financial plan



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

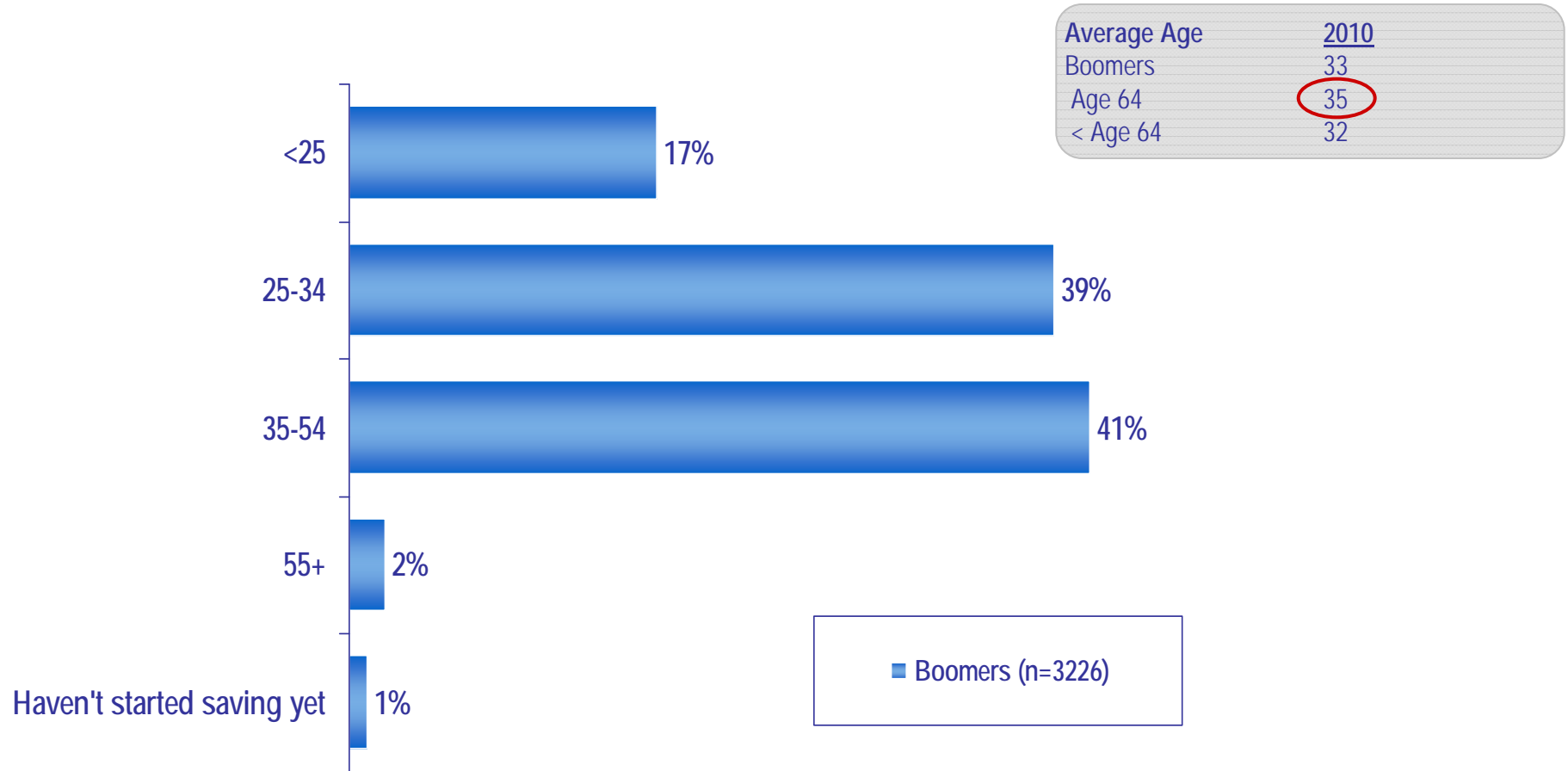


QB1Cnew. When did you first develop your formal written financial plan?
Base: Have a financial plan



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

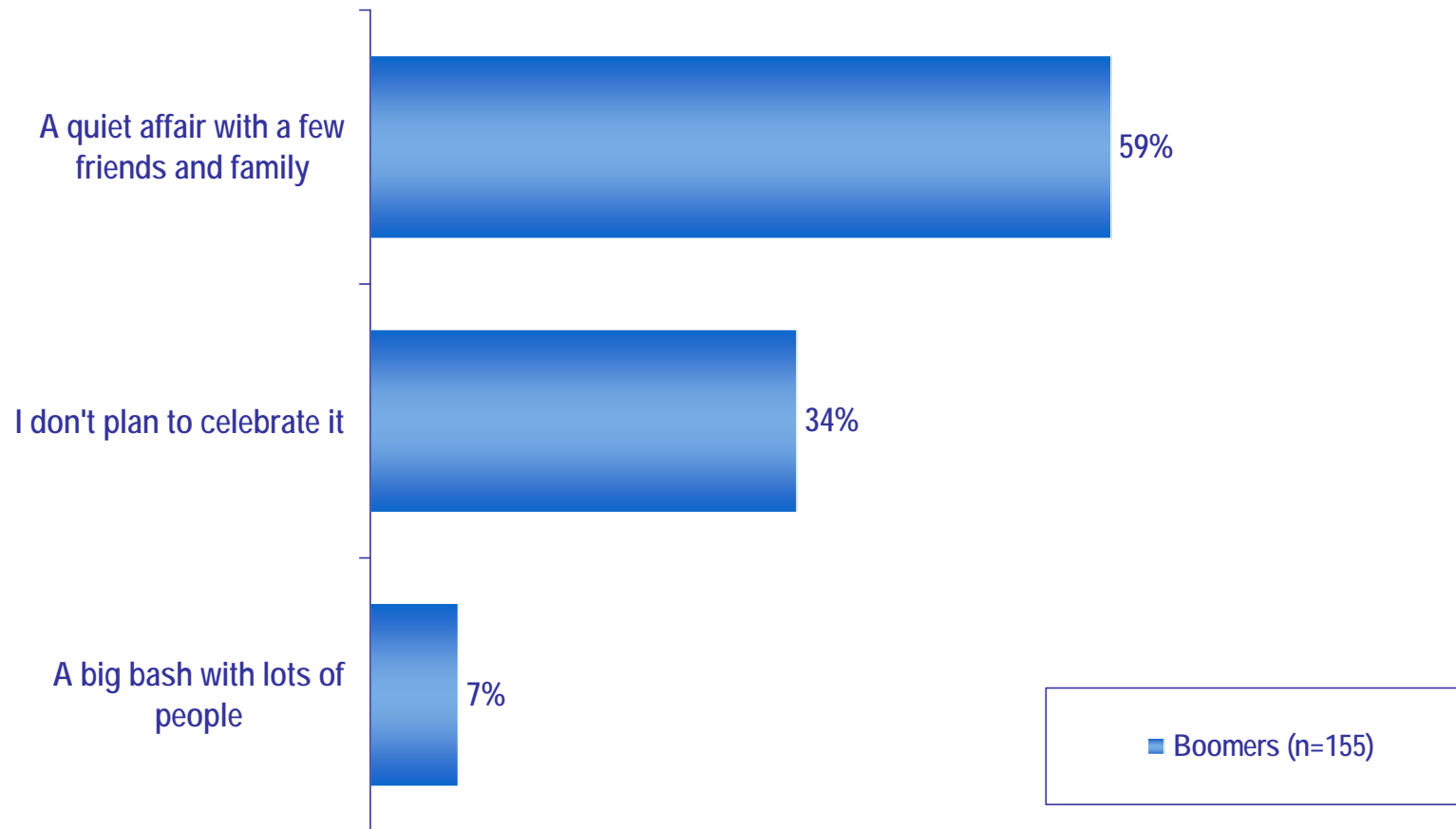
- 64 year olds Boomers started saving, on average, at an older age than younger Boomers



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



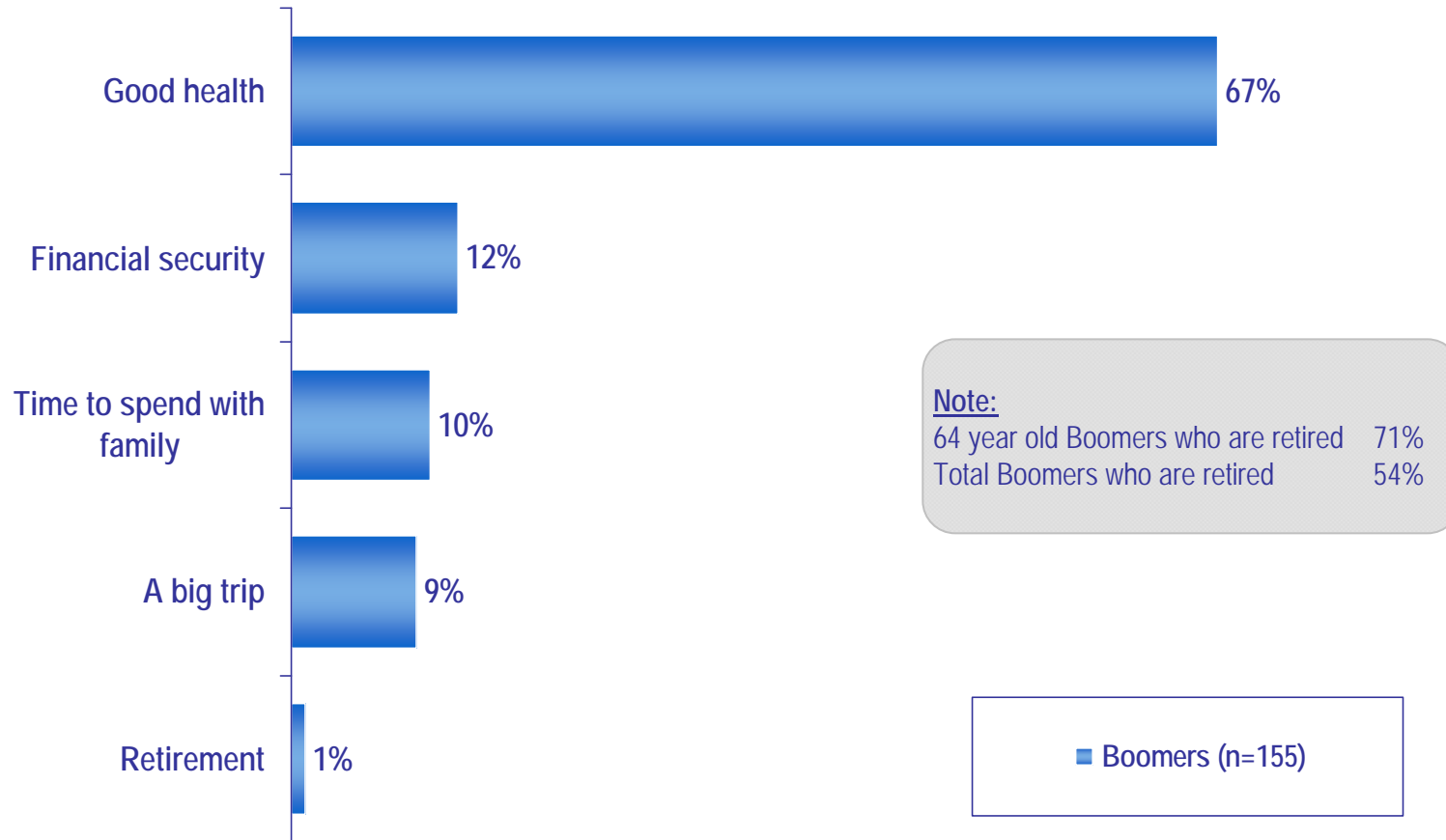
The majority of Boomer 64 year olds plan to celebrate their 65th birthday quietly with family and friends



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