




Real people, real stories

Retirees share their stories about their journey, and what they wish they would have known or done differently to prepare for their ‘someday’.

Retirement planning can be complex and some decisions are irrevocable. And it all takes place within the rest of life. It isn’t just a financial journey; it’s an emotional one, too.

Listen as these retirees talk about their stories. These are real people with real stories. Learn about their journey, what they did, and what they wished they would have known or done differently to prepare.

	<p>Susan: Retired executive assistant</p> <ul style="list-style-type: none">• Single, lives in Massachusetts, dealing with health issues.• Executive assistant for a non-profit for 28 years.• Forced into retirement and was in shock, emotionally and financially unprepared.
	<p>Marty: Retired school teacher</p> <ul style="list-style-type: none">• Widowed, lives in California.• As a school teacher, her husband a musician—they struggled to make ends meet.• Sorry they didn’t pay more attention to their retirement planning.• Retired at 67—wanted to work longer, but couldn’t.
	<p>Doff and Robin: Retired from financial services and PR</p> <ul style="list-style-type: none">• Married, live in Pennsylvania.• Started their careers in Boston and decided to change jobs so they could start their lives together and have a family.• Learned about saving and investing as part of their jobs. Always paid themselves first and budgeted what was left.• Health care is a big cost they budget for. Medicare was something “I needed to go back to college to understand.”

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