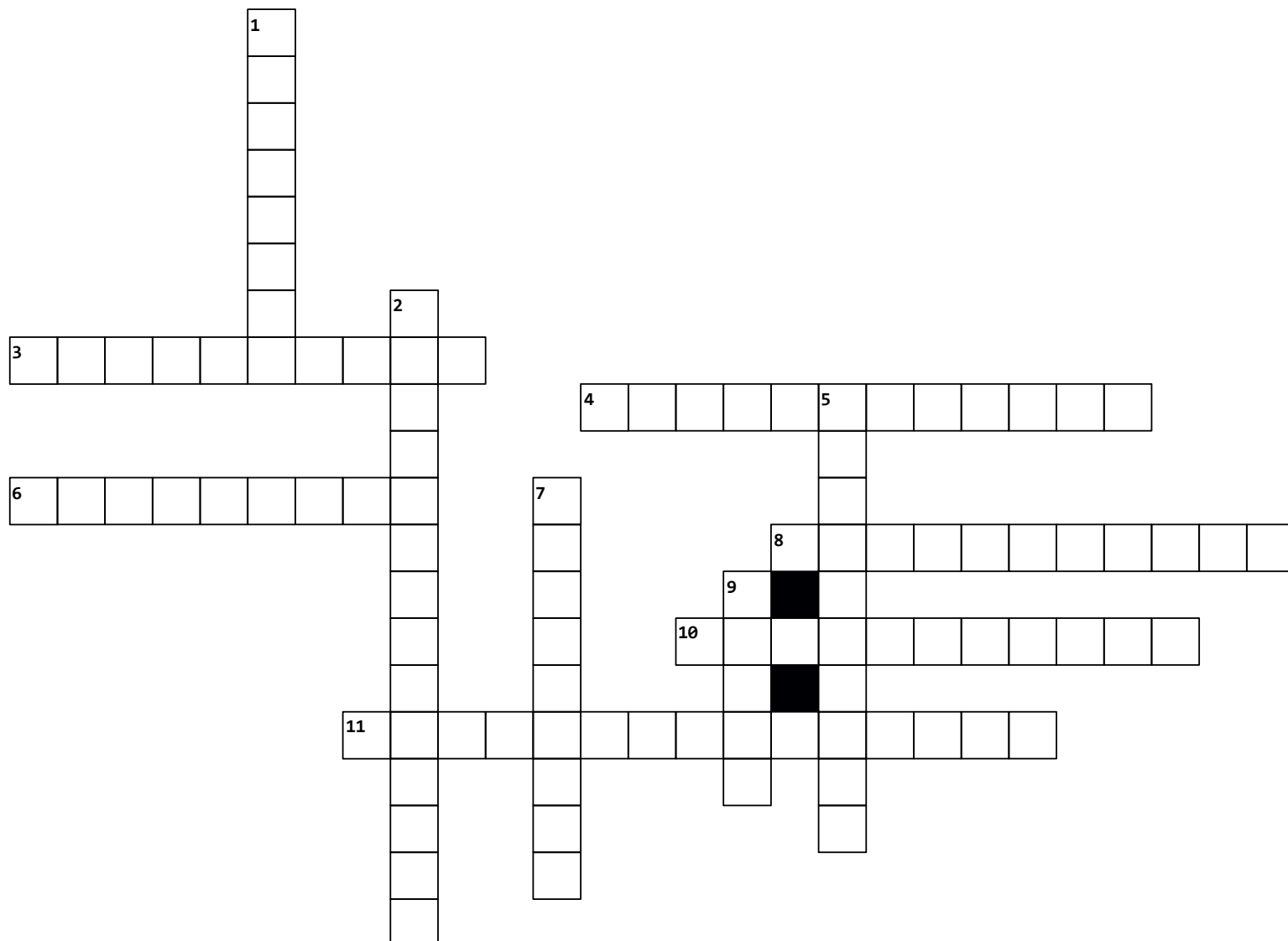


Retirement Plan Crossword

Let's see how well you know some common questions and terms about a typical retirement plan!



Across

3. The act of taking money out of your 401(k) account.
4. A lump sum paid to a participant or beneficiary.
6. Average age of retirement.
8. The party designated by a participant to receive the retirement plan benefits of a deceased participant.
10. An eligible employee who is covered by a retirement plan.
11. A timeline that determines the portion of a participant's accrued benefit or account balance.

Down

1. Transferring funds from one plan to another.
2. A fund of funds designed to become more conservative as a certain date approaches.
5. An asset or item acquired with the hope of generating income or gaining appreciation.
7. Involving trust, especially about the relationship between a trustee and a beneficiary.
9. An amount of money that an employer chooses to make to participating employees' retirement plans offered by the company.

For more information contact MCF at **retire@mcfadvisors.com** or 859.967.0990.

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Answer key:

1. Rollover
2. Target Date Fund
3. Withdrawal
4. Distribution
5. Investment
6. Sixty Five
7. Fiduciary
8. Beneficiary
9. Match
10. Participant
11. Vesting Schedule