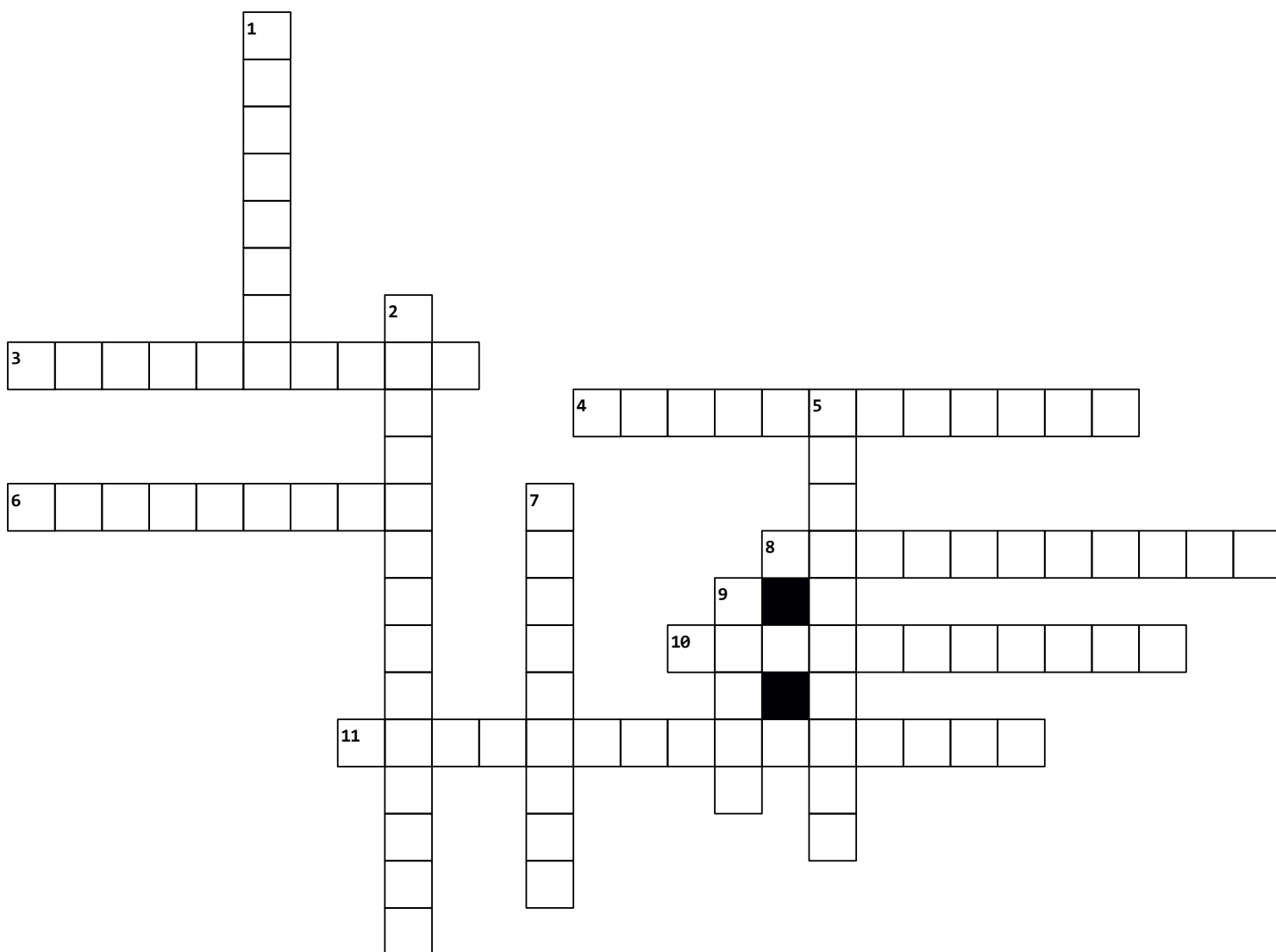


# Retirement Plan Crossword



## Across

- 3. The act of taking money out of your 401(k) account early, will receive penalty.
- 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. (You) Involving trust, especially concerning the relationship between a trustee and a beneficiary.
11. 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.
5. An asset or item acquired to generate income or gain 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.

Please access your retirement plan provider's website or consult with your financial professional at [\[PHONE\]](#) or [\[WEBSITE\]](#).

Answer key:

1. Rollover
2. TargetDateFund
3. Withdrawal
4. Distribution
5. Investment
6. SixtyFive
7. Fiduciary
8. Beneficiary
9. Match
10. Participant
11. VestingSchedule

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