



AIA Trust Week Equitable Webinar

Many architects don't know where to begin their retirement planning. This Webinar is designed to give AIA members, components, and staff an understanding of the key considerations for effective retirement planning and savings. The AIA Trust is pleased to provide AIA members with the opportunity to earn 1 AIA Continuing Education Credit by reviewing the webinar and answering the following 10 questions. After you complete the test, write your name and member number on the completed test, scan, and email it to AIATrust@aia.org. Once we receive your questionnaire, you will be emailed an answer sheet with the correct responses and the learning credit will be added to your online transcript.

1. Research shows that your action in your first money memory, (i.e., spender, saver,) relates to how you "use" money now:
 - a. True
 - b. False

2. Of the four buckets of financial planning, the mid-term bucket is represented by 401k, 403b, SEPs, simples, pension plans:
 - a. True
 - b. False

3. Examples of the protection bucket of financial planning include municipal bonds and Roth IRA:
 - a. True
 - b. False

4. The effects of inflation over time have little to no impact on your future budget planning:
 - a. True
 - b. False

5. An example of the “cost of procrastination” is the positive effects of saving early:
 - a. True
 - b. False

6. A 25-year-old and a 50-year-old will need to contribute approximately the same amount of money to reach \$500k in savings at retirement:
 - a. True
 - b. False

7. Waiting until age 40 or 50 to begin saving for retirement doesn’t impact the advantage of compounding:
 - a. True
 - b. False

8. The rule of 72 is an estimate for the age you should retire at:
 - a. True
 - b. False

9. In general, it makes sense to draw retirement income from taxable and nontaxable sources:
 - a. True
 - b. False

10. At age 40 to 60, some key financial goals include, build nontaxable bucket, pay off debts, will, power of attorney and living will:
 - a. True
 - b. False