

NAME: _____

DATE: _____

ACTIVITY

Time Jump: Ages 67+ Analysis

What + Why: Analyze how long-term financial choices can change retirement outcomes, financial protection, and investment growth over time.

Supporting Materials:

Long-Term Planning Pathways (Age 67+) (Case Study)

Instructions:

1. Review the **Long-Term Planning Pathways (Age 67+)** table in your case study materials.
2. Answer both analysis questions.
3. Support your responses with evidence from the case study materials.
4. Be ready to explain your thinking.

Analysis Questions

1. Pathways A, B, and C all started with the same blended investment strategy earlier in the topic. Looking at the personal investment balances at age 67, what explains the differences among them, and what does this suggest about the importance of continuing contributions over time?
2. Pathway C pays \$720 more per month in insurance premiums than Pathway A. Using evidence from the table, explain whether that trade-off makes financial sense and under what circumstances it might not.