

Saving and Investing Interview

	Total Points Earned
14	Total Points Possible
	Percentage

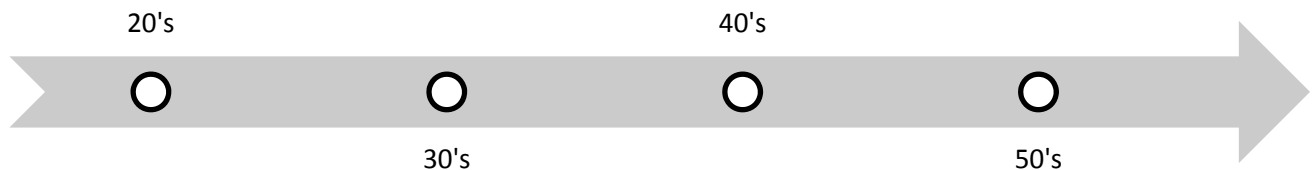
Name _____

Date _____

Class _____

Directions: Interview a retired adult over the age of 50. This person should be someone you know and care about. In addition to the interview questions below, develop two additional questions to ask. (14 points for completion)

1. Were you able to save and invest money in your 20's, 30's, 40's and 50's?
 - a. If so, what saving and investment tools did you use at each stage?



2. What were your greatest challenges to saving money?
3. What is a financial goal you have achieved in your lifetime and how did you approach this goal?
4. Financially, what do you worry about the most when thinking about retirement?
5. What advice would you give someone my age about saving and investing for the future?
6. Additional question:
7. Additional question:

Name of adult	
Signature	
Date	