

Retirement Planning Checklist



Personal Information

Name _____

Date Of Birth _____ Retirement Date _____

Financial Planning

• Evaluate Retirement Savings

- Current retirement account balances
- Other savings and investments
- Pension plan

• Estimate Retirement Expenses

- Housing
- Utilities
- Healthcare
- Transportation
- Leisure and entertainment
- Travel plans

• Create A Retirement Budget

- Compare estimated expenses to expected income
- Adjust savings and spending plans as necessary

• Debt Management

- Pay off high-interest debt
- Plan for remaining debt payments

• Insurance

- Review health insurance options
- Consider long-term care insurance
- Review life insurance needs

Lifestyle Planning

• Plan Your Retirement Activities

- Hobbies and interests
- Volunteer Work
- Travel Plans

• Health and Wellness

- Maintain a healthy lifestyle
- Regular medical check-ups

• Social Connections

- Stay connected with family and friends
- Join clubs or groups for social activities

Additional Consideration

• Housing Decisions

- Downsizing or relocating
- Modifying your home for aging in place

• Work and Income

- Part-time work or consulting opportunities
- Passive income streams

DISCLOSURES

There can be no guarantee that strategies promoted will be successful and no guarantee of positive results.

All investing involves risk including loss of principal. No strategy assures success or protects against loss.

Investing in mutual funds involves risk, including possible loss of principal. Fund value will fluctuate with market conditions and it may not achieve its investment objective.

Dividend payments are not guaranteed and may be reduced or eliminated at any time by the company.

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