Retirement Checklist
For Those Within 10 Years of Retirement

Questions To Ask Yourself

Check if you know the answer.

- ☐ Have I run forecasts with expected and worst-case assumptions?
- ☐ Do I have a tax plan that determines what type of accounts I will draw on during what time periods?
- ☐ Have I fully evaluated all of my health insurance options for Medicare and before age 65 (if applicable)?
- ☐ Do I know if I need coverage for long-term heath care?
- ☐ Are my will, trust and personal powers of attorney up to date?
- ☐ Do I need more or less life insurance?
- ☐ What do I need to know about moving in retirement? Should I sell my home?
- ☐ What percentage of my portfolio should be in stocks, bonds, and cash.
- ☐ When should I begin drawing Social Security benefits?
- ☐ Will I pay a lot of tax at age 72 when I am forced to take money from my retirement assets?
- ☐ What should I do with my 401(k) or pension from my employer in retirement?
- ☐ How long should I keep specific financial records?
- ☐ Do I have a financial plan and all of the important documents in one location?
- ☐ Do I have an estate plan ready?
- ☐ Do I know how I'll spend my time in retirement?
- ☐ Do I know how much I can safely spend in retirement?

How did you do? If you checked 12 or more, you are definitely a planner! If you are missing some check marks, there's still good news. Legacy Financial Group is here to help you get those boxes checked. Give us a call today to start a conversation about planning for your retirement.

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