Retirement Checklist for Those With More Than 10 Years

Questions To Ask Yourself

Check if I know the answer.

- ☐ Do I know how much I need to save each year to help ensure I retire at my standards?
- ☐ Do I qualify for an employer retirement account and do I know if they provide a match?
- ☐ If so, are I contributing enough to be eligible for the full match?
- ☐ Do I know the difference between a traditional IRA and a Roth IRA?
- ☐ Do I qualify to make a contribution to an IRA?
- ☐ Have I completed an investment-risk-tolerance quiz in the past 12 months and compared that to my current investment allocation?
- ☐ Is my current allocation proper for my personal situation?
- ☐ If something happens to me or my spouse, would I have sufficient savings or insurance to meet goals?
- ☐ Have I run projections on how long my money will last in retirement?
- ☐ Have I engaged in end-of-life planning?
- ☐ What are my retirement dreams—where will I live, what will I be doing?
- ☐ Are those dreams compatible with those of my partner?

How did you do? 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 financial future.

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