ALL SEASONS WEALTH

RETIREMENT PLANNING
checklist

10+ Years Until Retirement

- [ ] Establish a financial plan and make sure your retirement savings are on track
- [ ] Boost your nest egg with catch-up contributions
- [ ] Diversify your investments
- [ ] Plan for non-discretionary expenses and have a vision for how you'll spend it
- [ ] Prepare for a long retirement
- [ ] Explore tax-efficient retirement income strategies
- [ ] Leave a lasting legacy
- [ ] Consider your insurance needs

5+ Years Until Retirement

- [ ] Take an inventory of your sources of retirement income
- [ ] Create a plan for managing healthcare costs
- [ ] Determine where you'll live and how long realistically you can do so

< 5 Years Until Retirement

- [ ] Set your target retirement date
- [ ] Decide when you'll take Social Security
- [ ] Establish a withdrawal strategy
- [ ] Review your Medicare options
- [ ] Revise your asset allocation strategy
- [ ] Get major expenses paid off completely
- [ ] Revisit your plan regularly

GOT QUESTIONS?
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