



## Retirement checklist

Transitioning into retirement can be intimidating, but it doesn't have to be. Use this checklist to help with the transition, stay organized and ensure you have addressed the necessary details.

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Research potential retirement income sources before investing (Social Security, pensions, retirement vehicles, investments, savings).

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Monitor account balances in retirement plans, IRAs, savings and investment accounts, and increase elective deferrals or voluntary contributions (if necessary) to achieve accumulation goal. If employer company extends offer to retire early, evaluate current assets.

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Obtain projected benefits from Social Security; likewise for military or civil service benefits, if applicable. If thinking about finding any sort of employment after retirement, consider how it could affect Social Security benefits.

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Review income which may reasonably be expected from all sources as of the anticipated date of retirement. Review anticipated post-retirement expenses.

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Evaluate new retirement location, or suitability of current home as a retirement residence if no move is anticipated.

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Make arrangements for post-retirement health and dental insurance coverage as needed.

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Evaluate physicians and hospitals in retirement location, especially in regard to any special medical needs or situations.

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Review wills, trusts, durable powers of attorney, appointments of healthcare representatives, and other related documents.

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Evaluate and consider long-term care insurance coverage.



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Stay engaged with your financial professional and take advantage of the tools, articles and resources we've made available to you to maintain your financial plan while in retirement.

Contact your dedicated financial professional and get started on your future at

1.800.426.3753

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