RETIREMENT CHECKLIST

FINANCIAL SECURITY

- [ ] *Retirement income plan (including Social Security claiming strategy)*
- [ ] *Investment allocation to sustain your investments throughout your retirement*

RISK & PROTECTION

- [ ] *Medicare planning to control your health care costs*
- [ ] *Insurance coverage (life, umbrella, homeowners, auto, health, long-term care)*

TAX PLANNING

- [ ] *Reducing lifetime taxes with RMD planning, investment asset location and partial Roth conversions*
- [ ] *Multi-year tax projections to schedule when to implement each strategy*

LEGACY & IMPACT

- [ ] *Tax-efficient charitable giving, including QCDs, DAFs and appreciated securities*
- [ ] *Lifetime giving to individuals in a way that reduces transfer taxes and minimizes family taxes*

PERSONAL FULFILLMENT

- [ ] *Define retirement lifestyle goals (travel, hobbies, philanthropy, volunteering, mentoring)*
- [ ] *Balance relaxation with engagement. Maintain social and community connections*

ORGANIZATION & NEXT STEPS

- [ ] *Gather important documents (trusts, wills, investment statements, tax returns)*
- [ ] *An advisor can help with ongoing needs. Reach out to one now at info@milestonefinancialplanning.com*

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