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*

MILESTONE
Financial Planning, LLC

Website
MilestoneFinancialPlanning.com

Contact
1-603-589-8010