

RETIREMENT CHECKLIST

FINANCIAL SECURITY

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

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

PERSONAL FULFILLMENT

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

RISK & PROTECTION

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

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

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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