

# RETIRING SOON CHECKLIST



## Is Retirement here or on the horizon?

Please reference this list for potential to-do items to consider to help you start on the path to your next great adventure.

### Talk to your financial professional about:

- Your specific retirement needs
- Your current asset inventory
- Your risk profile
- Withdrawal strategies
- Do I need to move retirement plan assets
- Action steps to help eliminate debt
- Social security withdrawal strategies
- Ensuring your beneficiaries are up to date on all of your retirement accounts

### Additional action items:

- Consider contacting a professional to discuss your Medicare eligibility and benefits
- Consider scheduling an appointment with your local social security office to begin your social security benefits application
- Talk to a professional about any tax incentives or available deductions