



Life Event Planning Checklist

Pre-Retirement

- Discuss Retirement Goals and Aspirations
- Review Investments
- Review Health Care
- Review Cash Flow and Emergency Funds Available
- Review RMD and Distribution Strategy
- Review Social Security Strategy
- Review Pension Strategy
- Residency Review – Does it Make Sense to Move?
- Review If There is a Need for Long Term Care
- Review all of these items with your financial advisor

