

Checklist: *Early Retirement Years*

(Expect to spend 15-years or more in retirement OR you're in your 60s or early 70s)

Name: _____

	RETIREMENT INCOME	NOTES
	Distribution Planning Discussion	
	Emergency Fund Discussion	
	Asset Allocation Discussion	
	Risk Tolerance Discussion	
	Retirement Goal Planning	
	Retirement Income Analysis	
	Required Minimum Distributions	
	RISK MANAGEMENT	
	Property and Casualty Insurance Review	
	Earthquake Insurance Discussion	
	Flood Insurance Discussion	
	Auto Insurance Review	
	Medicare Supplement Plans	
	Umbrella Policy Discussion	
	Homestead Discussion	
	Medical Emergency Evacuation Discussion	
	Home Warrantee Discussion	
	Long Term Care Discussion	
	Long Term Care Needs Analysis	
	Long Term Care Policy Review	
	ESTATE PLAN	



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Will Discussion	
Living Trust Discussion	
Executor Discussion	
Letter of Instruction	
Durable Power of Attorney Discussion	
Health Care Proxy/Living Will Discussion	
Review Titling of Assets	
Annual Beneficiary Review	
Guardian Discussion	
Charitable Giving Discussion	
Estate Planning Attorney Referral	
Successor Trustee Discussion	
Corporate Trustee Discussion	
Gifting Discussion	
Estate Tax Discussion	
Special Needs Planning	
Providing for Children from Previous Marriage	
Wealth Transfer Plan Discussion	
BANKING	
Budget Discussion	
Cash Flow Discussion	
Annual Balance Sheet Review	
Mortgage Review*	
Debt Elimination Strategies	
Home Equity Loan/LOC Discussion	



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	Bank Review	
	SOCIAL SECURITY	
	Annual Statement Review	
	Medicare Discussion	
	OTHER SUGGESTIONS	
	Personal Valuables Inventory	
	529 Plan Discussion Grandchildren	
	Organ Donation Discussion	
	Identity Theft Discussion	
	CPA Referral	
	Personal Insurance Referral	
	Children Money Discussion	
	Parent Game Plan Discussion	
	Rental Real Estate Discussion	
	Rental Real Estate Evaluation	
	Home Modification Discussion	
	Reverse Mortgage Discussion*	
	State Relocation Discussion	
	Assisted Living Options	
	Medical Advisory Services	Possible Source: PinnacleCare
	Healthcare Insurance Advisory Services	Possible Source: Health Plan One
	Insurance Claim Advisory	Possible Source: Broadspire
	Social Media Discussion	



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