

Checklist: *Late Retirement Years*

(You have been retired for more than 10 - 15 years OR you're in your Late 70s or older)

Name: _____

RETIREMENT INCOME	NOTES
Emergency Fund Discussion	
Asset Allocation Discussion	
Risk Tolerance Discussion	
Retirement Goal Planning	
Retirement Income Analysis	
Required Minimum Distribution	
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 Policy Review	
ESTATE	



SILVERTREE
WEALTH PARTNERS

542 Washington St., Suite 104 // Ashland, OR 97520 // O 541.201.8988 // F 541.201.3063
www.silvertreewealthpartners.com

Securities offered through Raymond James Financial Services, Inc. Member FINRA/SIPC. Investment advisory services are offered through Raymond James Financial Services Advisors, Inc. SilverTree Wealth Partners is not a registered broker dealer and is independent of Raymond James Financial Services. Raymond James does not provide tax or legal services. Please discuss these matters with the appropriate professional*. Raymond James Financial Services and your wealth advisor do not solicit or offer residential mortgage products & are unable to accept any residential mortgage loan applications or to offer or negotiate terms of any such loans. You will be referred to a qualified Raymond James Bank employee for your residential mortgage lending needs. Raymond James Financial services, Inc. does not provide advice on mortgages.

Checklist: *Late Retirement Years*

(You have been retired for more than 10 - 15 years OR you're in your Late 70s or older)

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	
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	
Bank Review	



SILVERTREE
WEALTH PARTNERS

542 Washington St., Suite 104 // Ashland, OR 97520 // O 541.201.8988 // F 541.201.3063
www.silvertreewealthpartners.com

Securities offered through Raymond James Financial Services, Inc. Member FINRA/SIPC. Investment advisory services are offered through Raymond James Financial Services Advisors, Inc. SilverTree Wealth Partners is not a registered broker dealer and is independent of Raymond James Financial Services. Raymond James does not provide tax or legal services. Please discuss these matters with the appropriate professional*. Raymond James Financial Services and your wealth advisor do not solicit or offer residential mortgage products & are unable to accept any residential mortgage loan applications or to offer or negotiate terms of any such loans. You will be referred to a qualified Raymond James Bank employee for your residential mortgage lending needs. Raymond James Financial services, Inc. does not provide advice on mortgages.

Checklist: *Late Retirement Years*

(You have been retired for more than 10 - 15 years OR you're in your Late 70s or older)

SOCIAL SECURITY	
Social Security Review	
Medicare Supplement Review	
OTHER SUGGESTIONS	
529 Plan Discussion Grandchildren	
Organ Donation Discussion	
Identity Theft Discussion	
CPA Referral	
Personal Insurance Referral	
Children Money Discussion	
Grandchildren Money Discussion	
Family Meeting	
Rental Real Estate Discussion	
Home Modification Discussion	
State Relocation Discussion	
Assisted Living Options	
Dispensation of Vehicle(s) Discussion	
Safe Deposit Box Location	
Plan for Pets Discussion	
Social Media Discussion	
Family Wealth Mission Statement	
Bucket List Discussion	



SILVERTREE
WEALTH PARTNERS

542 Washington St., Suite 104 // Ashland, OR 97520 // O 541.201.8988 // F 541.201.3063
www.silvertreewealthpartners.com

Securities offered through Raymond James Financial Services, Inc. Member FINRA/SIPC. Investment advisory services are offered through Raymond James Financial Services Advisors, Inc. SilverTree Wealth Partners is not a registered broker dealer and is independent of Raymond James Financial Services. Raymond James does not provide tax or legal services. Please discuss these matters with the appropriate professional*. Raymond James Financial Services and your wealth advisor do not solicit or offer residential mortgage products & are unable to accept any residential mortgage loan applications or to offer or negotiate terms of any such loans. You will be referred to a qualified Raymond James Bank employee for your residential mortgage lending needs. Raymond James Financial services, Inc. does not provide advice on mortgages.