

Retirement Plan Checklist

Retirement Accounts

Rebalance allocations to fit your retirement goals.

- 401(k)
- 403(b)
- Traditional IRA
- Roth IRA

Income

Monitor estimates to get an idea of the monthly income you're on track to have in retirement.

- From Work
- From Social Security
- From Investments & Other Sources

Basic Monthly Expenses

Update your estimates based on inflation.

Cash Flow

How does your estimated monthly income measure up to your estimated expenses?

Health Care Expenses

Factor in new health conditions and associated costs that have cropped up since your last review.

Assets

What is the value of your total assets and how easily can you liquidate them if necessary?

- Personal Home
- Other Real Estate
- Your Business
- Investments (Stocks, Bonds, etc.)

Debts

Are you on track to pay off your debts before retiring? If you do, how much of what you're paying now can be diverted toward retirement savings and investments? Will you have new debts in retirement?

- Mortgage
- Auto
- Personal Debts
- Other Debts

Estate Planning

Do you need to update your estate planning strategy?

- Will
- Family Trust
- Life Insurance Changes
- Long-Term Care Insurance
- Health Care Proxy
- Do Not Resuscitate Decision
- Burial or Final Expenses Insurance