

Retirement planning checklist

Use this checklist to guide you through one of the most exciting stages in your financial life—preparing to retire!

- ☐ Save as much as you can in your retirement accounts.
- ☐ Don't be shy about asking for professional advice.
- ☐ Prepare a budget for your expenses in retirement.
- ☐ Plan to pay off your debt.
- ☐ Consider purchasing an annuity.
- ☐ Plan to withdraw from your retirement accounts.
- ☐ Determine the age at which you'll retire.
- ☐ Sign up for Medicare and Medigap.
- ☐ File for your Social Security retirement benefits.