

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.