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.

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