

Your retirement income planning checklist



- ☐ Plan for a long life
- ☐ Plan for increases in health care expenses.
- ☐ Have a housing plan
- ☐ Plan for long term care assistance
- ☐ Plan for the impact of inflation
- ☐ Regularly evaluate your goals.
- ☐ Optimize social security benefits.
- ☐ Avoid unnecessary taxes.
- ☐ Have an effective distribution strategy
- ☐ Utilize a variety of financial products.