Celebrating Over 30 Years...

J. Charles Dunham CFP®, CRPC® Comprehensive Wealth Planner

Charles.Dunham@lfg.com Telephone: (205) 263-5318 www.FirstFinancialGroupInc.com



...and Supporting You for the Next 30

John "Goose" Dunham Comprehensive Wealth Planner

John.Dunham@lfg.com Telephone: (256) 548-2158 www.JCDFinancialServices.com

Life Event Planning Checklist: Pre-Retirement

\bigcirc	Discuss retirement goals and aspirations
\bigcirc	Review investments
\bigcirc	Review health care
\bigcirc	Review cash flow and emergency funds available
\bigcirc	Review RMD and distribution strategy
\bigcirc	Review social security strategy
\bigcirc	Review pension strategy
\bigcirc	Review if there is a need for long term advisor
\bigcirc	Review all of these items with your financial advisor

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