

**Celebrating Over 30 Years...**

**...and Supporting You for the Next 30**

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## **Life Event Planning Checklist: Pre-Retirement**

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