

Retirement Checklist: Protect Your Financial Health

Planning for retirement comes with a lot of decisions. Where you'll live, what you'll do, what your personal finances can support. This checklist can help you think through the many financial factors there are to consider. Review and confirm all the boxes are ticked to secure the retirement you want.



Estate Planning

- ☐ Funeral Plan and Expenses
- ☐ Health Care Directives
- ☐ Life Insurance
- ☐ Power of Attorney
- ☐ Property
- ☐ Trust
- ☐ Will

Expenses

- | | |
|--|--|
| ☐ Clothing | ☐ Insurance/Medical |
| ☐ Entertainment | ☐ Technology |
| ☐ Food | ☐ Transportation |
| ☐ Giving | ☐ Utilities |
| ☐ Housing | |

Healthcare

- ☐ Affordable Care Act Offered Policy
- ☐ COBRA
- ☐ Health Savings Account
- ☐ Medicare and Supplementals

Retirement Wealth

- | | |
|--------------------------------------|--|
| ☐ 401(k) | ☐ Life Insurance |
| ☐ 403(b) | ☐ Pension |
| ☐ Annuities | ☐ Properties |
| ☐ Income | ☐ Savings |
| ☐ Investments | ☐ Social Security |
| ☐ IRA | ☐ Stock Options |

Long-Term Care: Choices to Consider

- ☐ Nursing Home or Other Communal Living Option Long-Term Care Insurance
- ☐ Family Caregiver
- ☐ Friends Life Care Membership. [See the difference having Friends can make here.](#)

Congratulations! You've completed your retirement checklist. While you assessed your current status, it is important to continually review this information as your situation may change. Friends Life Care is here to work with you – and your Financial Advisor – to help secure and protect your financial well-being. Ready to learn more? Call [215-628-8964](tel:215-628-8964), ext. 235, email info@flcpartners.org, or visit www.FriendsLifeCare.org.