

# 60's Financial Checklist

Track Your Progress With This Financial Checklist

## You're likely going through a big life change as you near or enter retirement!

---

### Answer The Big Questions

Are you ready to retire? Have you done retirement projections? How long will your assets last at different spending levels?

### Understand Tax Implications

When looking at your retirement strategy, which account will you take money from first?

### Manage Your Debt

By this age, you should be debt free or very close to becoming so.

### Get Your Estate Plan In Order

Wills, trusts, healthcare proxies, power of attorney should all be up to date.

### Evaluate Long-Term Care

Make decisions on Long Term Care insurance, Social Security, and Medicare.

### Adjust Your Investment Strategy

Your strategy may need to change as the investment horizon decreases.

### Consider Life Insurance

Life insurance often gets more and more expensive to obtain/maintain with age, you may not need it if you have no dependents or income to protect.