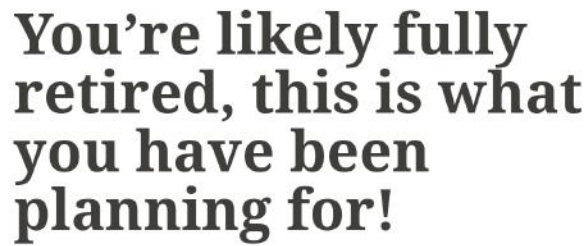




70's Financial Checklist

Track Your Progress With This Financial Checklist



You're likely fully retired, this is what you have been planning for!



Income Sources

Continue to review your passive sources of income; pensions, rental income, social security, etc. How much of your expenses do they cover?



Asset Allocation

Focus on proper asset allocation, withdrawal and tax strategy in order to ensure your savings and portfolio can maintain your desired lifestyle and facilitate your goals.



Distributions

Are you correctly taking all of your Required Minimum Distributions? There are big tax penalties if you are not.



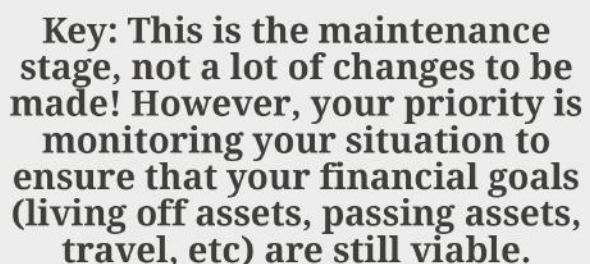
Estate Planning

Update estate planning. Is your estate plan current with tax laws? Do your assets flow as you intend with current estate laws?



Life Insurance

If you still have life insurance policies, review! It may no longer be relevant or necessary to maintain.



Key: This is the maintenance stage, not a lot of changes to be made! However, your priority is monitoring your situation to ensure that your financial goals (living off assets, passing assets, travel, etc) are still viable.