

50's Financial Checklist

Track Your Progress With This Financial Checklist

For Now

- Start Planning Now**
TIP: It's never too late to start your financial plan
- Utilize Catch-Up Contributions**
TIP: Take advantage of the perks of age as soon as you can
- Reassess Risk Profile**
TIP: Realign your risk with your time horizons
- Estate Planning**
TIP: Redefine what you want to leave behind
- Protection**
TIP: Your earning potential is at it's peak-protect it.

For The Future

- Think About Retirement**
TIP: Timing your retirement can greatly affect your total savings
- Focus on Reducing Fixed Expenses**
TIP: Pay a little extra on your mortgage if you can
- Find Passions**
TIP: Give this some thought before you exit the building
- Plan Trips While You're Working**
TIP: They don't all have to wait until retirement
- Take Care Of Your Health**
TIP: You need it for all you're planning for