

# 12 STEPS TO PREPARE FOR RETIREMENT

When preparing for your retirement, consider the following tasks when you are ten years or less away from retirement.



-   1. Review sources making up your retirement paycheck
-   2. Check for retirement income shortfalls
-   3. Make allowable catch-up retirement contributions (50 or older)
-   4. Build up emergency savings
-   5. Retire high-interest consumer debt
-   6. Create a plan to deal with healthcare costs
-   7. Form a strategy to deal with long term care
-   8. Bone up on Medicare basics
-   9. Determine your best Social Security claiming scenario
-   10. Devise a drawdown strategy for your retirement portfolio
-   11. Prepare your estate to make life easier for your family
-   12. Let your retirement dreams run wild



## WELCOME TO RETIREMENT