# Retirement Financial Planning Checklist

*5 Years to a great retirement*

## 5 YEARS TO GO

- Think about your post-retirement life
- Estimate retirement spending & income
- Track your net worth
- Run retirement calculators

## 3 YEARS TO GO

- Track your spending
- Target 30X of spending for portfolio
- Make a plan to eliminate debt
- Evaluate LTC insurance
- Understand Social Security options

## 2 YEARS TO GO

- Schedule a “mini-retirement.”
- Evaluate post-retirement insurance options
- Build a “bridge” to retirement accounts
- Think about post-retirement Purpose
- Spend some time in potential retirement areas
- Set up a password keeper

## 1 YEAR TO GO

- If downsizing, finalize timing for home scale
- Update estate docs w post-retirement details
- Develop a Retirement Withdrawal Strategy
- Determine Social Security claiming strategy
- Build Retirement paycheck via Bucket System
- Consider pre-tax IRA rollovers to Roth

## 6 MONTHS TO GO

- Decide when to tell employer
- Establish personal email, update accounts
- Move data from work to personal computer
- Consider setting up a HELOC
- Focus on life outside work
- Finalize insurance plans
- Celebrate!


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