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## Life Event Planning Checklist

### Pre-Retirement

- ☐ Discuss Retirement Goals and Aspirations
- ☐ Review Investments
- ☐ Review Health Care
- ☐ Review Cash Flow and Emergency Funds Available
- ☐ Review RMD and Distribution Strategy
- ☐ Review Social Security Strategy
- ☐ Review Pension Strategy
- ☐ Residency Review - Does It Make Sense to Move?
- ☐ Review If There is a Need for Long Term Care
- ☐ Review all of these items with your financial advisor



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