RETIRING CONTENT PACK

You have worked for a long time, a *long* time, to get to this stage of life and perhaps you are not quite there yest but planning for it: Retirement. Congratulations! We are sure you have lots of plans for all the time you will now have. We don't want your carefully laid plans to go awry, so, we have pulled together resources to help you avoid some of the traps and pitfalls of transitioning to retirement.

After reading below, click here to find out what help we can provide to help lower your taxes in retirement: Save More After Retirement Taxes Page

COMPREHENSIVE GUIDE

- Guide to Living in Retirement

CHECKLISTS

- What Issues Should I Consider Before I Retire?
- 2020 Retirement Calendar Checklist
- Pre-Retirement Planning Checklist

DOWNLOADABLE RESOURCES

- New Retirement Rules: SECURE Act of 2019 Guide
- Living in Retirement Fact Sheet
- 4 Challenges During Retirement Infographic
- Retirement Planning and Savings Guide

FLOWCHARTS

- Will I Have to Change Healthcare Coverage as I Transition into Retirement?
- If I Retire Early, Should I Buy Health Insurance Through the Health Insurance Marketplace?

ONLINE RESOURCES

- AARP Retirement Planning Homepage
- FINRA RMD Calculator
- Kiplinger Retirement Home Page

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ARTICLES

- Making Sense of RMDs
- Roth Planning Opportunities in 2020 Webinar
- How To Save Money On Taxes In Retirement
- Basic Strategies for Retirement
- Getting Ready to Retire? Here's a Planning Guide for the 5 Years Before Your Last Day
- 5 Questions to Ask Yourself 5 Years Before You Retire
- Cracking the Nest Egg: When Accumulation Becomes Distribution

PODCASTS

- Kiplinger "Your Money's Worth" Podcast
- October 21, 2019: Wealth Matters: "6 Things to Do When Approaching Retirement"
- July 1, 2019: Wealth Matters: "8 Retirement Blunders to Avoid"

VIDEOS

- Changes to Taxes & Retirement Planning in 2020 Webinar

CONTACT TAYLOR FINANCIAL GROUP TO SEE HOW WE CAN HELP YOU TRANSITION SMOOTHLY INTO RETIREMENT.

CLICK HERE TO SCHEDULE A COMPLIMENTRAY 20-MINUTE PHONE CONSULTATION WITH DEBRA TAYLOR

TAYLOR FINANCIAL GROUP, LLC
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