

The Successful Retirement Checklist

5 Questions To Ask To Ensure You're Set Up For Retirement

Knowing your retirement readiness BEFORE you actually retire is critical to your long-term success. This is your chance to learn...in advance... how prepared you are for retirement to help avoid learning late in life that you under estimated your money needs.

Answer the following questions by scoring yourself 1-5 (1 = No Plan At All >>>> 5 = Complete Detailed Plan In Place)

Do you have an income plan reflecting exactly how much income will you need each year to fund your retirement lifestyle including tax liabilities and added medical costs?

Do you have your income sources itemized showing exactly how much income will be generated from each source to satisfy your annual income needs?

Do you have your assets mapped out and separated by their purpose?

There are three specific "purposes" required to fulfill a retirement plan:

1. Income immediately following your retirement,
2. Income later to adjust for inflation,
3. Cash designated for big-ticket items.

Do you have an income replacement plan in place for your spouse to cover the loss of social security or pension income if you were to predecease him or her?

Do you have updated legal documents signed and in place that designate financial power of attorney and medical directives along with separate wills and trusts?

Now, tally the results to learn your retirement readiness!

Total Score:

What Your Score Means

- **A perfect score of 25** is not typical but is certainly possible. Just keep in mind that it is best to be critical of your plan rather than be overly optimistic to give you the highest probability for success.
- **If you scored between 20 and 24**, you may be well on your way toward finalizing your retirement plans. You may just need a couple of tweaks to get things locked down.
- **If you scored 15-19**, you could be close to where you need to be but likely just need a second set of eyes working with you to fine-tune some areas and get you on track.
- **If you scored 14 or less**, you may not be as prepared as you would like but many times we can get you moving in a positive direction after some strategic planning.

Whatever score you rated yourself, there is an opportunity to improve your probability for a successful retirement. At Skrobonja Financial Group, we help people make smart choices with their money.

If you'd like help creating a financial plan that gives YOU control over your money so you can build your dreams, live a life of financial freedom, and enjoy your perfect retirement,

click the button below to schedule a complimentary call with our team now.

SCHEDULE YOUR CALL NOW

(or visit thebuildwealthsystem.com)