

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 Whether There's a Need for Long Term Care
- ✓ Review all of these items with your financial advisor



Office: 724.720.9317

Mobile: 412.585.4553

www.mmmadvisory.com

2009 Mackenzie Way, Suite 100
Cranberry Township, PA 16066