

9 ESSENTIAL RETIREMENT PLANNING QUESTIONS

Print this questionnaire and review your responses
with your partner or financial advisor.

1| Do you know how to protect yourself and your retirement income from inflation and disruptions?

2| Have you determined that you can easily pay all your monthly and yearly expenses in retirement?

3| Are you delaying retirement until you have reached a financial milestone, like paying off a mortgage?

4| Have you worked with Social Security to determine your benefits and when you can claim them?

5| Are you willing to review your current insurance policies?

6| How many separate retirement accounts do you have?

7| Are you factoring inheritances into your planning?

8| Are you thinking about working part-time?

9| Do you have a trusted financial advisor leading you toward your retirement goals?

Start your golden years on the right track. Discuss your retirement planning
strategy with one of our experienced advisors today.

Call us at 608.514.1044

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