

Transition Checklist

Use this checklist to help identify steps you may need to take before you make your transition to retirement.

- I know approximately how much annual income I'll need in retirement.
- I've consolidated similar financial accounts, such as 401(k) plans.
- I understand my Social Security benefits and have a clear plan for when to begin receiving payments.
- I understand how much of my annual retirement income will come from my retirement accounts and how much will come from other sources.
- I have a detailed list of the expenses I expect to incur in retirement.
- I've gotten updated quotes on all necessary insurance policies, including health insurance.
- I know where my health insurance will come from once I'm retired.
- I understand how my health insurance works with Medicare.
- I have a good understanding of whether or not I may need long-term care insurance.
- I talk regularly with my spouse/partner about our goals and interests for retirement.
- My spouse/partner and I share similar ideas about where we'll live in retirement.
- I have a plan for how to spend my weekdays when I'm no longer working full-time.
- I have regular conversations with my tax and financial advisors about my retirement income needs.

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