

Six decisions. One retirement.

A practical starting point for your next planning conversation.

Check the areas you want to discuss. You do not need account numbers, balances or private documents to use this checklist.

☐ 01 RETIREMENT INCOME

List your expected income sources and the expenses they need to cover.
What changes when a paycheck stops?

☐ 02 TAX COORDINATION

Identify withdrawals, retirement accounts and tax questions to review together.
Which decisions should my tax professional help evaluate?

☐ 03 SOCIAL SECURITY

Gather benefit estimates and consider household and survivor needs.
How does claiming timing fit with my other income?

☐ 04 INVESTMENT RISK

Consider when savings may be needed and how comfortable you are with losses.
How would a market decline affect planned withdrawals?

☐ 05 HEALTHCARE

List coverage transitions, Medicare questions and possible care needs.
Which healthcare costs have I included in my plan?

☐ 06 LEGACY

Check whether beneficiaries and estate documents reflect your current wishes.
Who needs to be involved in updating my plan?

Your next useful conversation.

Bring this page to the webinar or a complimentary consultation.

My three priorities

1.

2.

3.

Questions I want answered

Share your worksheet with Mike

Save the completed PDF, then use the email link below and attach your saved copy. The link opens a draft; it does not attach or send your answers automatically.

Email my worksheet to Mike

Do not include account numbers, Social Security numbers or private documents.

Prefer to skip the class and talk with Mike?

Request a free 25-minute, no-obligation Q&A.

[View the checklist and meeting options online](#)