

## Retirement Landing

Name \_\_\_\_\_.

Retirement Date \_\_\_\_\_

9 phone/zoom calls designed to keep the Member on track and comfortable in the 2 months before retirement and the two months after.

### 8 weeks before

Date \_\_\_\_\_

- Confirm retirement date
- Set date to let boss/work know (if not already)
- Decide on date of first distribution
- Finalize distribution numbers
- Reach out to health insurance broker to discuss private insurance or Medicare supplement
- Finalize timing of paying off any debt
- Apply for home equity line of credit, if appropriate
- Decide if I plan to keep any whole life insurance policies

### 6 weeks before

Date \_\_\_\_\_

- Finalize distribution strategy for tax efficiency and planner set up recurring distributions
- Confirm with HR if there are any carryover benefits from separation of service paid unused vacation time, insurances (LTC) that can carry over, stock grants or options to be sold)
- Apply for Social Security (if appropriate)

### 4 weeks before

Date \_\_\_\_\_

- Layout a plan for how you will spend your time for the first two months of retirement
- Review and adjust asset allocation for distributions
- Finalize LTC strategy (will I purchase or not)

### 2 weeks before

Date \_\_\_\_\_

- Confirm emergency reserve is fully funded, or have plan to do so
- Confirm health insurance is in place for retirement
- Reach out to any pensions or annuities to confirm retirement date and prepare for distribution.
- Finalize exactly where first month's income will come from

## **Retirement Week**

Date \_\_\_\_\_

- Confirm retirement went smoothly
- Confirm equity comp is/will be paid out
- Congratulate
- Ask if there are any questions

## **2 weeks after**

Date \_\_\_\_\_

- Roll over 401k
- Confirm health insurance is in place

## **4 weeks after**

Date \_\_\_\_\_

- Confirm any distributions were paid on time
- Discuss lifestyle of first four weeks (fun, relaxing, boring, great, terrible)
- Check in on 401k has been roll over

## **6 weeks after**

Date \_\_\_\_\_

- Confirm 401k has been rolled over
- Layout a plan for how you will spend your time for the first year of retirement

## **8 weeks after**

Date \_\_\_\_\_

- Finalize and ensure:
  - distribution is up and running
  - 401k is rolled over
  - plan for how they will spend the next year of retirement is in place
  - Any questions?