



Are you Ready for Retirement?

Below are ten questions to help you determine if you're ready for retirement. If you answer "No" to any questions, perhaps it's time to give **The Tenet Financial Group** a call to discuss your situation.

Questions:

1. I have actively discussed when I would like to retire, what retirement looks like for me and my new purpose? Yes No
2. I have a financial plan in place that takes into consideration my retirement income needs, inflation, budgeting, spending, a longer life and future expenses? Yes No
3. My investments are aligned with my goals and risk tolerance and I am comfortable with the level of risk I'm taking. Yes No
4. I understand how taxes will impact my retirement income and spending? Yes No
5. I am prepared if I need long term care? Yes No
6. I understand my Social Security benefits and when to start taking them? Yes No
7. I understand Medicare benefits and when to start taking them? Yes No
8. I have an updated (last three years) Power of Attorney, Medical Directive and Will? Yes No
9. I have a wellness plan that incorporates physical activity and nutrition into my life? Yes No
10. My financial life is consolidated and organized? Yes No

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