

## Close to or in Retirement

### *Investors in their 60s*

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#### Goals to Consider in your 60s:

There has been a lot of preparation, planning and saving to get to this point so it's time to enjoy! Most investors are starting to think about retirement or slowing down their career in their 60s and the big question is, what now? To prepare for the best retirement, below are some items to consider in your 60s.

- Reevaluate your life insurance and disability insurance
- Reevaluate your estate planning documents
- Consider putting your non-retirement assets in a revocable living trust
- Based on your retirement age, start allocating your investments for your retirement needs
- Consider housing changes in retirement
- Have all debt paid off by retirement
- Have a plan for social security benefits
- Be sure you understand your options with Medicare and Medical Supplemental insurance