

Enjoying Life in Retirement

Investors in their 70s

Goals to Consider in your 70s:

These years are said to be some of the best years as you are enjoying your time with family and have either retired or are winding down. Hopefully you have started some new hobbies and are enjoying family time and some new friendships. Now that you are retired, and have saved your money, there are different financial items to review and prepare.

- Reevaluate estate planning documents & wishes
- Reevaluate your life insurance and IRA beneficiaries
- Start taking your required minimum distribution
- Think about how you would like to be cared for later in life if needed
- Start the conversation with your family on life-planning
- Think about your legacy, how do you want to be remembered?