

Retirement Planning Checklist

Your Journey. Your Goals. Your Summit.

Use this worksheet as an educational starting point. Add notes that reflect your household.

☐ Clarify desired retirement timeline

☐ Inventory retirement accounts

☐ Review contribution rates

☐ Understand employer match

☐ Review beneficiaries

☐ Consider inflation and longevity

☐ Discuss tax and investment questions with qualified professionals
