

Retirement: Don't Go It Alone!

In my experience of working with hundreds of single Savers (single, divorced, separated or widowed), one thing's for sure – the uncertainty of retirement. That's why we created this checklist – to give you an understanding of what's at stake and how to prepare a GamePlan for dealing with what's ahead for you.

Simply check all that apply to you:

- ☐ I do not fully understand my Social Security Benefit and how to maximize it
- ☐ I do not know my current tax bracket or how to keep taxes to a minimum
- ☐ I do not have a plan to deal with the Tax Tumor® buried inside my IRA or 401(k) Plan
- ☐ I do not have a written GamePlan that shows how to use and enjoy all my assets
- ☐ I do not understand RMD (Required Minimum Distribution) and how to maximize it
- ☐ I do not have a plan for my loved ones when I die or if I go into a nursing home
- ☐ I fear the home I currently live in is going to be too costly and difficult to maintain
- ☐ I am worried about the amount of debt I have and how it will impact my retirement
- ☐ I do not have a plan to deal with the potential costs of Long-Term Care
- ☐ I am worried that I will run out of money

My Biggest Concerns/Priorities to discuss with a Retirement Planning Specialist:

1. _____
2. _____
3. _____

Please call **877-499-9255** to schedule your no cost, no obligation appointment to discuss how Tony Walker Financial can assist you in the use, enjoyment and protection of your money in retirement.