



The 5 Year Retirement Checklist

Is retirement on the horizon in the next 5 years? Here are a few things to consider as you begin to plan.

- * If married, discuss your retirement plans with your spouse
- * Prepare a realistic budget
- * Collect information about pension and benefits
- * Determine what additional health or long-term care insurance you will need
- * Compare projected income with your projected expenses
- * Assess the adequacy of your investment portfolio and increase savings if necessary
- * Review annually and make any necessary adjustments

Thank you,

AWM Team



Tips to Help



Steve Giacobbe, CFA, CFP®

Chief Investment Officer | Managing Partner

Accredited Wealth Management

Office : [\(502\) 290-1905](tel:5022901905)

awm@accreditedwm.com

www.accreditedwm.com/



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4938 Brownsboro Road, Suite 201 - Louisville, KY 40222

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