



## Health and Wealth

### *Reset and Re-evaluate*

As you continue your routine of maintaining financial independence and stability, your personal obligations may shift over time. Prioritizing all of your responsibilities will ensure that you stay on track with the financial goals you have established.

*Consider the following:*

#### **Reassess Your Finances**

Just as you would visit a doctor for annual checkups to ensure you are in good health, your finances should be reviewed as well. Periodic reviews of all your financial accounts, from savings to investments will ensure you are on pace to achieving your goals.

#### **Longevity in Retirement**

On average women live 5-10 years longer than men. As you near retirement, you may want to have discussions around:

- Whether you will be relocating to be closer to family
- If you plan on traveling
- Health concerns for either you or your spouse/partner
- Adult children who may still rely on your care
- Concerns about outliving your savings

#### **Prepare Lifetime Planning Documents**

It is also important at this time to create a comprehensive plan that incorporates a living will, trust, power of attorney and health care proxy. These documents along with your financial accounts should be reviewed for proper beneficiary and guardianship designations. This will provide you with the confidence that your health care and legacy wishes will be carried through.

**Engaging in conversations with your team will help you plan properly for the retirement you have always envisioned.**



**Please contact us with questions:**

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