



**BELGER**  
FINANCIAL GROUP

# Retirement Readiness Checklist

## Contact Us

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# RETIREMENT READINESS CHECK

## Instructions:

For each question, check the option that best fits you.

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### 1. Your Retirement Timeline

Do you have a clear idea of when you want to retire?

**As Soon As Possible**

**In 5 Years**

**In 10 Years**

### 2. Retirement Income Needs

Do you know how much monthly income you need in retirement?

**Yes**

**No**

**Unsure**

### 3. Social Security & Pension

Are you confident that you can live off your Social Security and pension for the rest of your life?

**Very Confident**

**Somewhat Confident**

**Not Confident**

### 4. Reliable Income (Paychecks in Retirement)

How many guaranteed income streams do you expect to have in retirement?

**1-2**

**3-4**

**5 or More**

### 5. Spending Plan

Are you confident that your money will last through retirement?

**Very Confident**

**Somewhat Confident**

**Not Confident**

## 6. Investments

Do you feel your savings are set up properly for retirement?

**Yes**

**No**

**Maybe**

## 7. Taxes

Do you have a plan to help reduce taxes on your retirement income?

**Fully Planned**

**Somewhat Planned**

**No Plans**

## 8. Healthcare & Protection

Do you feel covered for major health costs or unexpected events?

**Fully Covered**

**Somewhat Covered**

**Not Covered**

## 9. Estate & Legacy

Do you have your will, trust, or beneficiary plans in place?

**Yes**

**No**

**In Process**

## Other Questions

What areas do you feel least prepared in?

What areas do you feel most confident in?

What worries you most about retirement?

What would make you feel fully prepared?

**SUBMIT**

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