

in your 60's

During your 60's, you're within 5-10 years of retirement age. Are you ready?

- Consider social security strategies
- Review current debts and major expenses
- Determine retirement date
- Consolidate retirement accounts
- Determine how much you will need for retirement
- Evaluate retirement activities commensurate with financial resources
- Evaluate medical insurance coverage post retirement
- Re-balance portfolio and diversify
- Review long term care needs
- Secure Medicare/health insurance
- Discuss annual tax planning

16130 Ventura Blvd, Suite 550 | Encino, CA 91436 | 818-305-6810 | rsowealth.com

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