

in your 70's

In your 70's, you may be in retirement. Pay attention to your health and finances.

- Avoid decisions under duress
- Keep family business agreements in writing
- Keep in touch with family and friends
- Manage Medicare carefully
- Plan for an adequate distribution rate that doesn't exceed your financial resources
- Prepare for medical issues
- Transition from work at your own pace
- Watch financial gifting guidelines
- Review your wills and trusts
- Discuss annual tax planning