



Why should you conduct a **10-Pt Longevity & Retirement Readiness Checkup™**

We're living longer, healthier and have greater assets than previous generations. This gives us more opportunities to maximize life as we age to 100+.

For people approaching "traditional" retirement age, it can be quite challenging to navigate the transition during which you think through how you want to live the next 30+ years?

The Best Way to Predict the Future is to Plan for It

What kind of retirement lifestyle do you want? How do you stay healthy and fit? How do you manage your finances to avoid outliving your initial nest-egg? How do you take care of family and causes? What about personal relationships? Where do you want to live? Do you want to engage in meaningful work, travel, continue learning, etc.? **There's so much to consider.**

Our 2-Step Longevity & Retirement Readiness process helps aging adults and their caregivers gain peace of mind that only comes from being prepared with a plan, **no matter what life throws at them!**



Break it Down into Phases. Whether you are approaching retirement or already in retirement, we believe there are distinct phases that your planning should be structured around. These phases can be explained in many terms such as employment, age, family and health status, just to name a few. In reality, the progression from one phase to the next is more of a continuum, and few move uniformly through the phases.

Pre – Age 50-64	Active – Age 65-74	Stable - Age 75-84	Secure - Ages 85+
Retirement budget planning	Part-time employment?	Travel & leisure scaled back	Predictable daily pattern
Social security & healthcare planning	Increased travel & leisure activities	Health issues may surface	Potential for onset chronic or catastrophic illness
Final stage of asset accumulation	Higher level of income distribution	Lower level of income distribution	Highest level of income distribution

Products developed by and delivered through a collaboration between OneSource Senior Living www.seniorlife123.org - Longevity Planning Advisors - www.clpadvisors.com and in support of national campaign – www.lifehappensplannow.com - Contact 203.344.7044 or info@seniorlife123.org

Longevity & Retirement Readiness Report Card™



High Priority Advanced Planning



Transitional event



Lifestyle Juncture



Pre-Retirement (50-64)

Retirement Budgeting (Grade __)



Estate Planning (Grade __)



Health, Life & LTC Insurance Assessment (Grade __)



Employment Alternatives (Grade __)



Social Security Optimization (Grade __)

Active Retirement (65-74)



Required Minimum Distribution (Grade __)



Medicare Enrollment/Management (Grade __)



Inheritance (Grade __)



Leisure & Travel Planning (Grade __)



Consolidating Personal Health Records (Grade __)

Stable-Retirement (74-84)



Establishing an Ethical Will (Grade __)



Understanding Future Care Options (Grade __)



Advance Healthcare Directives(Grade __)



Philanthropy/Volunteerism (Grade __)



Strategies for Staying at Home(Grade __)

Secure Retirement (85+)



Possible Assisted Living Options (Grade __)



Care Management & Advocacy (Grade __)



Transportation Services (Grade __)



Physical, Mental & Spiritual Wellness(Grade __)