

# RETIREMENT PLANNING CHECKLIST

Did you know 30% of retirees will return to work after their initial “retirement”? A comfortable retirement means different things to different people. At Box Financial Advisors, we define retirement as a point in someone’s life where they aren’t required to earn a paycheck anymore.

## HERE’S A RETIREMENT PLANNING CHECKLIST FOR YOU TO USE:

- 1 Define what your retirement looks like
- 2 Gather account statements to determine your financial security
- 3 Determine the date you will begin drawing Social Security
- 4 Create a diversified investment strategy
- 5 Write down all of your expenses and factor in flexibility
- 6 Test your plan with a trial run for three months

One of our knowledgeable team members at Box Financial Advisors will be reaching out soon to follow up on your retirement planning checklist. Our comprehensive financial planning and investment strategies help clients achieve their goals. If you would like more information about us, please see our website at [www.boxfinancial.com](http://www.boxfinancial.com).



**BOX  
FINANCIAL  
ADVISORS**

1200 S. Main St., Ste. 1600 • Grapevine, TX 76051  
P. 817.865.1815 • F. 817.424.1404

[www.boxfinancial.com](http://www.boxfinancial.com)