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Retirement planning questions for your financial professional

Making a big change in your life triggers some big questions. A financial professional can help you work through the answers.

Print this list and have it handy when you're ready to start the conversation.

- Am I on track to achieve my retirement goals?
- How much should I contribute to my retirement plan to get me closer to my dreams?
- Should I be making changes to my investments or retirement portfolio?
- How should I rebalance my portfolio to stay well-diversified?

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- What percentage of my retirement income will come from Social Security?

- How long should I wait before taking Social Security?

- How should I manage withdrawals from other accounts to minimize my tax burden?

- Will I have sufficient funds to stay in my current home when I retire?

- What are the tax implications of moving to another state or country?