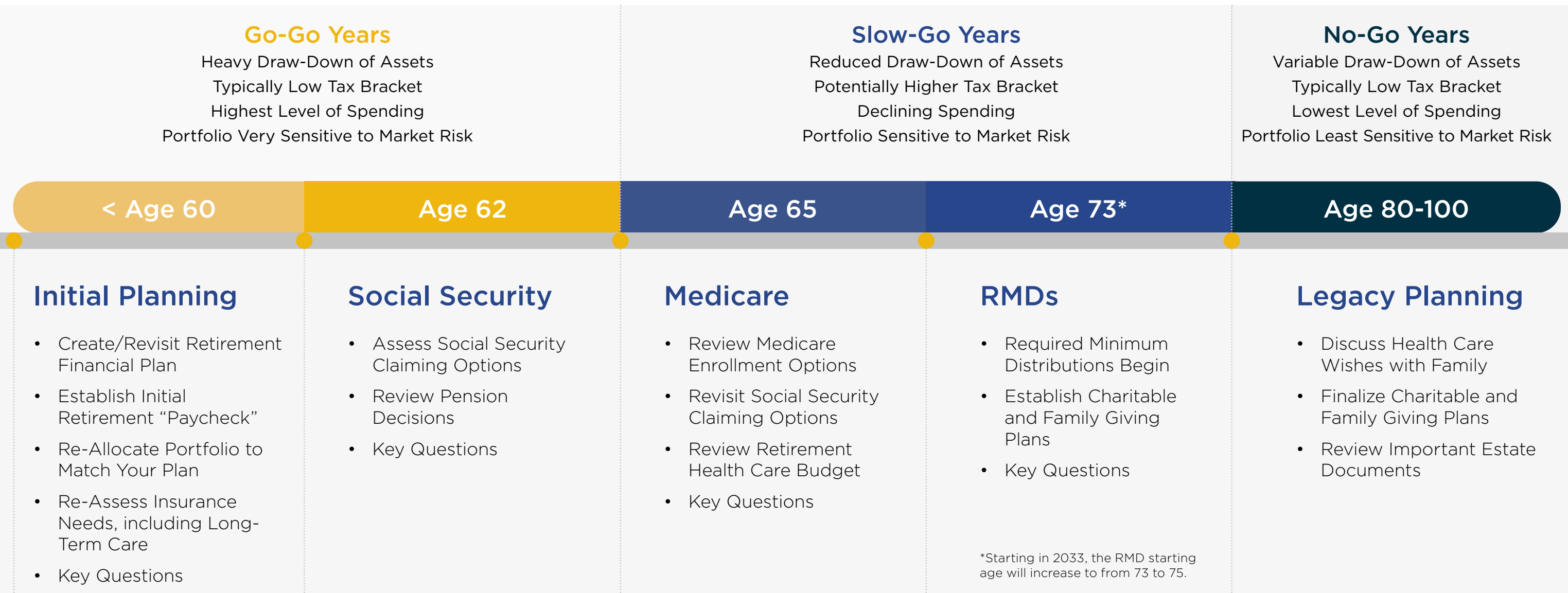


# Retirement Planning Timeline

We recognize retirement looks different and may fall at a different time for everyone. This timeline serves as a basic guide for retirement-related considerations.



## Key Questions

1. What updates do we need to make to our initial financial plan?
2. What changes should we make to our portfolio risk level?
3. Should we adjust our retirement paycheck?
4. Should we convert Traditional IRA or 401(k) funds to a Roth IRA?
5. What tax planning opportunities should we consider in this new phase of retirement?

