CRESCENT CITY
RETIREMENT GROUP, LLC
RETIREMENT AND INVESTMENT PARTNERS

QUESTIONS TO ASK BEFORE YOU RETIRE

1. What estate planning documents should I have to avoid legacy planning mistakes?
2. How do I leverage what I have for wealth transfer?
3. What are the most tax efficient assets to pass on to my heirs?
4. How do I handle a spend thrift, special needs or minor beneficiary?
5. What is the average cost of LTC (long term care)?
6. If I require LTC, how do I protect my assets and remain independent?
7. What does Medicare pay for as it relates LTC?
8. What are examples of Long Term Care Environments?
9. How do I determine how much NET income I will need in retirement?
10. What are the best strategies to maximize my social security benefits?
11. How can I lower my taxation on my social security benefits?
12. What portfolios should I invest in for my retirement?
13. Why does the sequence of returns matter in retirement?
14. If the stock market drops significantly, how will that affect my plan?
15. How should my liquid assets be invested?
16. How can I build a tax efficient distribution strategy in retirement?
17. What are RMDs and how can they affect my tax strategy?
18. What percentage of my income should be guaranteed in retirement?
19. How often should I review my retirement plan with my advisor?
20. What are the typical costs to maintain my retirement plan?

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