



CARDINAL ADVISORS

## 7 Worries - Retirement Planning

In the video entitled "7 Worries-Retirement Planning" Hans and Tom elaborate on planning for retirement.

	7 WORRIES - RETIREMENT PLANNING	
S.S. <input type="checkbox"/>	FRA AGE TO START? SPOUSE? OTHER MONEY/DELAY?	RISK ASSESSMENT SPENDING PRINCIPAL LONGEVITY-80s +90s INCOME ANNUITIES
MED <input type="checkbox"/>	YOU/SPOUSE WORKING 65+ ORIGINAL MEDICARE/ADVANTAGE MEDIGAP-OPEN ENROLLMENT IRMAA-MEDICARE TAX POA. HEALTH POA. HIPPA STROKE, DEMENTIA, PARKINSON'S KIDS/SPOUSE RESPONSIBILITY CRISIS? HOME HEALTH CARE	SURVIVING SPOUSE BENEFICIARIES 2ND MARRIAGES WILLS + TRUSTS PLAN? OR REMAINDER?
LTC <input type="checkbox"/>	WHAT'S IRA MONEY FOR? DISTRIBUTION PLAN-INCOME-RMD TAX PLAN ESTATE PLAN-BENEFICIARY(S) ROTH CONVERSION	TAX BRACKET MGMT ROTH CONVERSION SS TAX PROVIS INCOME OTHER 6 WORRIES
401K/ IRA <input type="checkbox"/>		
		INCOME <input type="checkbox"/>
		ESTATE <input type="checkbox"/>
		TAXES <input type="checkbox"/>

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# Trusted Advice on Solutions for the 7 Worries

Retirement brings change. Cardinal is here to give you a roadmap to navigate these changes, especially when it comes to your money and legacy. There are 7 worries that retirees, or future retirees, come to us with for help.

1

[Social Security →](#)

2

[Medicare →](#)

3

[Long Term Care →](#)

4

[IRAs, 401k, 403b →](#)

5

[Life Insurance & Estate Planning →](#)

6

[Retirement Income & Investment →](#)

7

[62+ Taxes →](#)

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