



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	INCOME <input type="checkbox"/>
MED <input type="checkbox"/>	YOU/SPOUSE WORKING 65+ ORIGINAL MEDICARE/ADVANTAGE MEDIGAP-OPEN ENROLLMENT IRMAA-MEDICARE TAX POA. HEALTH POA. HIPPA	SURVIVING SPOUSE BENEFICIARIES 2ND MARRIAGES WILLS + TRUSTS PLAN? OR REMAINDER?	ESTATE <input type="checkbox"/>
LTC <input type="checkbox"/>	STROKE.DIMENTIA.PARKINSON'S KIDS/SPOUSE RESPONSIBILITY CRISIS? HOME HEALTH CARE	TAX BRACKET MGMT ROTH CONVERSION SS TAX PROVIS INCOME OTHER 6 WORRIES	TAXES <input type="checkbox"/>
401K/ IRA <input type="checkbox"/>	WHAT'S IRA MONEY FOR? DISTRIBUTION PLAN-INCOME-RMD TAX PLAN ESTATE PLAN-BENEFICIARY(S) ROTH CONVERSION		

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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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