DENVER
WEALTH MANAGEMENT

DENVER WEALTH MANAGEMENT, INC. | STANDARD OF CARE

RETIREMENT

All of your years of tireless work are about to pay off. Whether you're dreaming about mimosas on the beach secluded from society or days spent eating ice cream with the grandkids, there are some financial considerations to address first. For assistance, please do not hesitate to reach out to our team—call our office at (303) 261-8015.

PLANNING YOUR RETIRED LIFESTYLE

- [ ] Consider and determine at what age you would like to retire.
- [ ] Contemplate your retirement lifestyle. Do you want to travel? Volunteer? Donate? Work?
- [ ] Determine where you would like to live (considerations may include proximity to family, weather, tax liability, etc.).
- [ ] Evaluate long-term care needs.

FINANCES

Depending on the complexity of your situation, we recommend meeting with various financial professionals to outline your wants and needs, including your advisor, accountant, estate planning attorney, etc.

- [ ] Analyze your Social Security benefit options and the age at which you would like to begin claiming those benefits.
- [ ] Speak with a professional regarding Medicare options.
- [ ] Consult a financial professional to determine a distribution strategy (how will you generate reliable income?).
- [ ] Review our Estate Planning Standard of Care checklist for long-term planning considerations.

| Helping successful individuals address their financial future.