

YOUR MONEY MATTERS**Retiring on Your Own | A Financial Continuity Checklist**

For people who have never married, are divorced, or are widowed, including those without children. Mark each item, then identify where follow-up may be needed.

1. Retirement income

Do I understand my Social Security options, retirement income sources, and spending needs?

Yes

No

Not sure

2. Tax coordination

Have I reviewed RMDs, Roth conversion opportunities, taxes, and possible Medicare premium effects?

Yes

No

Not sure

3. Liquidity and care

Could I fund home assistance, transportation, financial administration, or long-term care?

Yes

No

Not sure

4. Everyday financial support

Is there someone trustworthy who could help with bills, notices, and paperwork before a crisis?

Yes

No

Not sure

5. Financial power of attorney

Have I appointed a financial agent, discussed the role, and considered appropriate safeguards?

Yes

No

Not sure

6. Health-care decisions

Have I named a health-care agent and communicated my care preferences?

Yes

No

Not sure

7. Successor trustee

If I have a trust, is a willing and capable successor trustee identified?

Yes

No

Not sure

8. Estate administration

Have I named someone to administer my estate and checked that they are willing to serve?

Yes

No

Not sure

9. Professional coordination

Do my key professionals know whom to contact and how responsibilities will be coordinated?

Yes

No

Not sure

10. Legacy and beneficiaries

Do my will, trust, and beneficiary designations reflect the people and causes I value?

Yes

No

Not sure

Your Financial Continuity Team

Different roles may call for different people. A named contact is not necessarily a legally appointed decision-maker; confirm appointments and authority with your attorney.

Financial agent under power of attorney

Handles financial matters as authorized by the document and law.

Name / organization: _____ Backup: _____

Successor trustee

Manages trust assets when authorized under the trust.

Name / organization: _____ Backup: _____

Health-care agent

Makes medical decisions when authorized under applicable documents and law.

Name / organization: _____ Backup: _____

Executor / personal representative

Administers the estate after death when appointed.

Name / organization: _____ Backup: _____

Everyday support contact

Helps monitor routine paperwork and coordinate assistance.

Name / organization: _____ Backup: _____

Financial advisor / CPA / attorney

Professional contacts for financial, tax, and legal coordination.

Name / organization: _____ Backup: _____

My Next Three Actions

1. _____
2. _____
3. _____

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