Ten questions for retirement or company downsizing

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- ☐ Do I need to get another job?
- ☐ Can I afford to do something I love?
- ☐ Should I take my social security early?
- ☐ Should I pay off my mortgage? Refinance?
- ☐ Should I downsize my house? Move to a lower tax area?
- ☐ Do I still need life insurance? If yes, should it be in a trust?
- ☐ Should I leave my 401(k) with my old company, or roll it over to an IRA?
- ☐ How much risk should I take in my portfolio? None? A little bit? A little more?
- ☐ How do I balance my need for growth with my need for stability?
- ☐ Does my advisor understand who I am, and what is important to me?

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