

RETIREMENT on the Horizon?

DID YOU KNOW?

- Social Security replaces only 40% of pre-retirement income for the average worker!
- Social Security Benefits could be TAXABLE INCOME depending on your AGI!
- Eligibility for Medicare is at age 65, but DOES NOT cover everything!

TEAM UP with one of our Pilot Grove Investment Advisors to help you get financially prepared!

Retirement Preparation Checklist:

1. Know your Expenses
2. Review your Health & Long-Term Care Needs
3. Have a Social Security Strategy in Place
4. Evaluate Income & Tax Strategies
5. Review your Investment Suitability
6. Assess the amount of Risk in your Financial Portfolio
7. Have a Cushion
8. Prepare Emotionally



*Leave the stress out of Retiring and contact us today to set an appointment!
Appointments available at all bank locations.*

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