



# Retirement Life Stage

When entering retirement, a whole new phase of spending and saving begins. In addition to retirement lifestyle, there are future considerations to think about such as estates, inheritances, and funeral expenses. It's important to review and adjust your life insurance policy accordingly.

## Retirement Can Happen at Any Age

- Millennials**  
Some Millennial entrepreneurs have built fast fortunes and may be ready to retire at a young age. By having the right conversations today, they can be well on their way to a successful retirement.
- Generation X**  
Depending on their life circumstances, some members of Generation X could be ready for an early retirement. Using the right tools and conversation starters, you can help educate them on options to consider for their optimal plan.
- Baby Boomers**  
Baby Boomers always have their eye on the big picture and retirement is the payoff. Help them protect and supplement their retirement assets.

## Resources for Increasing Retirement

### Checklists for Major Milestones

- [Marriage/Remarriage](#)
- [Divorce](#)
- [Major illness/Long-term disability](#)
- [Care of aging parent](#)
- [Preparing for death](#)
- [Surviving relatives](#)
- [Executor](#)
- [Estate planning](#)
- [Succession planning](#)

### Online Calculators

- [Social Security Benefits](#)
- [72\(t\) Calculator](#)
- [Required Minimum Distribution \(RMD\)](#)
- [Life Insurance Calculator](#)
- [Long Term Care Calculator](#)
- [Estate Tax Planning](#)
- [Net Worth](#)
- [Asset Allocation Calculator](#)

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