Retirement Checklist

Making the most of your retirement

Knowing your priorities is a great start to designing your unique retirement. And you may find you want some expert advice on building a financial plan to reach your goals. That's where RBC® Financial Planners come in; with the experience and expertise to take your vision to reality.

The questions below touch on some of the areas a financial planner can address, showing you how put your design into action.

When I retire:	
☐ What will my income look like and how do I apply for government benefits?	☐ Should I update my Will and Power of Attorney?
☐ When should I start to take money from my registered accounts?	☐ Do I need to change the asset allocation of my investment portfolio?
☐ How do I minimize income tax?	☐ What costs will I pay for my investments, and what am I getting for those fees?
☐ Can I split my pension income with my spouse?	☐ What do I need to consider if downsizing my home?

To learn more about how RBC can help you create your ideal retirement, speak to a Financial Planner today.

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