

Time for Your Checkup

Independence Day has come and gone, meaning the year is more than half over. Many people have a medical checkup with their doctor this time of year to make sure everything is OK, and to make health improvements. This is also a good time of year to visit with your financial advisor to evaluate your retirement plan and make sure it is up-to-date and accurate.

In other words, it's time for your "Retirement Checkup!"

When you meet with your doctor, you know you will be asked some tough and sensitive questions. Doctors have to ask these questions during exams and evaluations to determine the state of your health, and to make suggestions for improvement. The same can be said when you are dealing with your retirement plan.

Retirement & Estate Planning



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Let's take a look at some common midyear retirement review questions that need to be addressed in order to keep your

retirement plan up-to-date and healthy.

- **Have you made, or been making, your retirement contribution for 2015?**
- **Have you made, or can you make, any strategic moves to become more tax efficient?**
- **Are you aware of all the tax and retirement planning law changes for this year?**
- **Is your investment plan and portfolio set up properly for growth and protection?**
- **How are your New Year's Financial Resolutions coming along?**
- **Do you need to make some adjustments to achieve your resolutions?**
- **What are the deadlines for the financial moves that you want to make this year?**
- **Are you 100% sure your planning is set up the most proper way for your unique and specific situation?**

Good physical health requires periodic checkups. The same is true for your retirement plan. Join me next week on the **Purpose Driven Retirement Show** as we address these important and vital questions for your midyear "Retirement Checkup." The show airs on **WWIB-103.7 FM**, Wednesday night at 7:30pm and Saturday evening at 5:30pm. You can also obtain this information and independent advice for your specific situation by contacting me at **(715) 835-6022, info@KeyStoneCV.com**, or through our website, **www.KeyStoneCV.com**.

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