MILITARY/VETERAN RETIREMENT CHECKLIST

YOU'VE SPENT YEARS SERVING OUR COUNTRY AND YOU DESERVE TO ENJOY YOUR GOLDEN YEARS. WHETHER YOU ARE TRANSITIONING OUT OF THE MILITARY OR ARE RETIRING FROM YOUR CIVILIAN CAREER, **HERE ARE ITEMS TO CONSIDER BEFORE EMBARKING ON YOUR RETIREMENT ADVENTURE AFTER YOUR SERVICE.**

RETIRING FROM THE MILITARY

- ☐ Contribute to your Thrift Savings Plan (TSP)
- ☐ Review the Department of Defense Transition Assistance Program (DODTAP) website
- ☐ Plan your final move, as some areas have a higher cost of living

RETIRING FROM YOUR CIVILIAN CAREER

- ☐ Pay off your debts
- ☐ Review your insurance needs, and update your health and life insurance
- ☐ Determine your income needs in retirement
- ☐ Create a retirement budget
- ☐ Diversify your portfolio
- ☐ Utilize a tax-efficient financial strategy
- ☐ Review your estate plan

WHETHER YOU NEED HELP UNDERSTANDING INCOME STREAMS, CREATING A TAX-EFFICIENT WITHDRAWAL STRATEGY, OR DIVERSIFYING YOUR PORTFOLIO, **AAFMAA WEALTH MANAGEMENT & TRUST LLC (AWM&T) CAN HELP.**

CONTACT A RELATIONSHIP MANAGER AT

910-307-3550

OR WWW.AAFMAA.COM/WEALTH, TO HELP PLAN YOUR DREAM RETIREMENT.

AAFMAA®
COMPASSION • TRUST • PROTECTION

AAFMAA Wealth Management & Trust LLC

FINANCIAL PLANNING • INVESTMENT MANAGEMENT • TRUST SERVICES

639 Executive Place, Suite 200, Fayetteville, NC 28305 • **1-910-307-3500** • www.aafmaatrust.com