

## Retirement Checklist

- Apply for Social Security approximately four months before retirement. Call 1-800-772-1213 for an appointment.
- Apply for Medicare four months before your 65th birthday. Call 1-800-772-1213 for an appointment.
- Review your Will, Living Will, and Organ Donor Instructions and have the necessary adjustments made.
- Prepare a checklist for your spouse or children. Include:
  - Military Records,
  - Burial Instructions and necessary papers,
  - A list of all advisors (Attorney, CPA, Financial Advisors, Insurance Agents), Life Insurance Policies, Long Term Care Insurance Policies, Medical Insurance policies
  - Birth and Marriage Certificates,
  - Titles to all Vehicles, including autos, boats, planes, cycles,
  - Decrees/Property Settlements from previous marriages,
  - Annuity and IRA Records,
  - List of Bank Accounts, Brokerage Accounts, Stocks and Bond Certificates Held
  - Real Estate Deeds
  - Preparation of "Vial of Life"

In a Medical Emergency, thinking clearly is difficult. Because of this critical information regarding a patient is not passed on to pre-hospital care providers, and in turn the receiving ER/ED staff. Such oversights can be life threatening. The "Vial of Life" Program was conceived to help alleviate this situation. The program consists of a form which is completed, put inside an empty pill bottle and attached to the top shelf of the refrigerator. Emblems are attached to the refrigerator and an outside window. For more information, contact the AARP, your local Emergency and Rescue Squads, or search for "Vial of Life" on the Internet.

- Burial Information: Have you thought about and left instructions for your family?
- Do you desire burial/cremation/other?
- Where do you wish to be buried?
- What type of Memorial Service, and where?
- Do you have a preference of Funeral Homes?
- Have any arrangements or prepayments been made?
- Who should be notified? Include name, address, phone, relationship?