FALCON
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Retirement

Congratulations on your retirement! While this is certainly a time to celebrate, it's not uncommon for recent retirees to find it stressful as well. We at Falcon Wealth Advisors want to help you with transition so you can begin enjoying your retirement years as soon as possible. Below, you will find some points to consider as you approach your retirement date. Please contact our team by phone at 913-326-1900 or email at service@ falconwealthadvisors.com so we can discuss these items in more detail and assist with any paperwork that may be needed.

Rolling over 401k or Pension Funds to an IRA

It's important to consolidate all your funds and ensure they are invested appropriately so you enjoy your retirement years. The first step in the rollover process is providing our team with recent statements for all your retirement accounts so we can determine who to contact and what type of accounts to open at Charles Schwab.

Cash Flow

One of the most integral parts of retirement is calculating where and how much to pull from your retirement accounts monthly to support your lifestyle while ensuring your nest egg can last for many years to come. We encourage you to schedule a meeting with our Financial Planning team to review your plan and determine an appropriate amount to meet your financial goals. Our Operations team can assist with the Schwab paperwork to link your bank account for automatic monthly deposits, making it simple and easy!

Social Security

Social security payments are a crucial part of the financial plan and can help supplement your retirement account distributions. Our team is happy to help answer any questions you have regarding social security and recommend including it in your financial plan or tax planning discussions.

Medicare

One of the big hurdles in the transition to retirement is determining medical coverage going forward. Our team can point you in the direction of several resources who can assist with your questions and shop the insurance marketplace for the optimal plan to suit your needs.

Beneficiaries

Retirement is always a good time to revisit the beneficiaries on your accounts to help ensure they are accurate. The Falcon team can assist with any paperwork to make changes to your beneficiary designations. Additionally, we encourage our clients to begin estate planning if they haven't done so already. We can recommend estate planning attorneys once you are ready to begin this process and will work in conjunction with them to ensure your retirement accounts are updated accordingly.

You've worked extremely hard to reach this milestone, let the team at Falcon Wealth Advisors take some of the stress off your plate so you can enjoy your retirement years to the fullest!