Trusted Living Report

Annual Retirement Protection Checklist

A simple annual review to help retirees stay organized, secure, and confident.

1. Beneficiary Review

☐ Confirm beneficiaries on IRAs, 401(k)s, and retirement accounts
☐ Review life insurance beneficiaries
☐ Confirm payable-on-death / transfer-on-death designations

2. Credit Review

☐ Check credit report for unfamiliar accounts or errors

3. Identity Awareness

☐ Review identity monitoring alerts (if applicable)
☐ Remain cautious with unexpected calls or emails requesting personal information

4. Document Organization

☐ Confirm location of will or trust
☐ Confirm location of insurance policies
☐ Maintain a list of financial accounts
☐ Keep key professional contact information accessible

5. Digital Access

☐ Maintain secure password storage
☐ Ensure spouse or executor has access instructions

6. Account Visibility

☐ Maintain a list of bank and investment accounts
☐ Review retirement income sources

Annual Reminder

This review can usually be completed in **one focused afternoon each year**.

Clarity creates confidence.

Jeff Nevin
Trusted Living Report
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