

# Get Retirement-Ready in 2026

## Retirement Prep Checklist

- ✓ Do you have a plan to replace your income in retirement?
  - #1: Develop a retirement budget.
  - #2: Coordinate sources of income.
- ✓ How will you replace other employment benefits?
  - #3: Review healthcare options & coordinate with Medicare enrollment.
  - #4: Assess your risk: life insurance and long-term care.
- ✓ Have you stress-tested your plan?
  - #5: Review retirement projections.
  - #6: Put contingency plans in place.
- ✓ Are you psychologically ready to retire?
  - #7: Develop your vision for retirement. (See True North questions on page 2)
  - #8: Identify helpers & support.

## Book a Free Discovery Meeting



Wisconsin

Book with Matt:  
715-598-7011

[go.oncehub.com/MattOlsonOffice](https://go.oncehub.com/MattOlsonOffice)



Minnesota

Book with Sarah:  
651-447-2235

[go.oncehub.com/SarahJohnsonOffice](https://go.oncehub.com/SarahJohnsonOffice)

Professionals associated with North Point Advisor Group, LLC may either be (1) registered representatives with, and securities offered through LPL Financial, member FINRA/SIPC and offer investment advice through Great Valley Advisor Group, a registered investment advisor; or (2) solely investment advisor representatives of Great Valley Advisor Group, and not affiliated with LPL Financial or (3) solely tax professionals of North Point Accounting & Tax (DBA North Point Advisor Group) and not affiliated with LPL Financial.

Sarah Johnson is solely an investment advisor representative of Great Valley Advisor Group, Inc., and not affiliated with LPL Financial.

# Your True North



## Thoughtful Questions

Who are the people that matter most to you?

If you knew you could meet all of your financial needs, and could do anything with your time, what would you do?

3 years from today, what would success look like personally and financially?

## Notes

Questions? Email us at: [info@northpointadvisorgroup.com](mailto:info@northpointadvisorgroup.com)