

# RELOCATION

## *Choosing Your Ideal Retirement Locale*

	YES	NO
1 Have you researched the cost of living in your potential new location?	<input type="checkbox"/>	<input type="checkbox"/>
2 Do you understand the tax implications of relocating to a new state or country?	<input type="checkbox"/>	<input type="checkbox"/>
3 Have you considered the healthcare services available in the potential new area?	<input type="checkbox"/>	<input type="checkbox"/>
4 Is the climate in the new location suitable for your health and lifestyle?	<input type="checkbox"/>	<input type="checkbox"/>
5 Have you visited the area multiple times to ensure it fits your needs?	<input type="checkbox"/>	<input type="checkbox"/>
6 Are there ample recreational and social activities in the area to keep you engaged?	<input type="checkbox"/>	<input type="checkbox"/>
7 Have you evaluated the safety and security of the neighborhood?	<input type="checkbox"/>	<input type="checkbox"/>
8 Do you have a plan for maintaining or establishing a social network in the new location?	<input type="checkbox"/>	<input type="checkbox"/>
9 Are you aware of any residency requirements or legal issues associated with moving?	<input type="checkbox"/>	<input type="checkbox"/>
10 Have you considered how this move will affect your family dynamics and relationships?	<input type="checkbox"/>	<input type="checkbox"/>

## QUESTIONS? CONTACT YOUR FINANCIAL ADVISOR



THE CENTER FOR  
RETIREMENT READINESS

### What Your Answers Might Mean:



**7–10 Yes Answers:** Well-Prepared For Relocation. Your careful planning shows you're likely ready to make a well-informed and successful move.



**4–6 Yes Answers:** Progressing, But Review Needed. You are heading in the right direction, but additional research and consideration are advised to ensure this move aligns with all aspects of your retirement.



**0–3 Yes Answers:** Further Planning Required. It's important to address the gaps in your preparation to avoid potential challenges and ensure a fulfilling retirement lifestyle in your new home.