



Petal & Paper

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Pre-retirement finances checklist



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R E T I R E M E N T F I N A N C E S

money checklist

State Pension · Forecast checked on gov.uk: ☐ Any NI gaps to fill: ☐

Pensions traced · All workplace/private pensions found: ☐ Total pot: £____

Income plan · Expected retirement income: £____ vs needs: £____

Accessing pensions · Understood options (annuity/drawdown/lump sum): ☐

Free guidance booked · Pension Wise (over 50, free): ☐

Debts and mortgage · Cleared / plan in place: ☐

Will and Power of Attorney · Will up to date: ☐ LPA considered: ☐

T H E B E T T E R P R E P A R E D T H E F I N A N C E S ,
T H E M O R E F R E E L Y Y O U C A N E N J O Y
R E T I R E M E N T

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