

WILL THE 'ONE BIG BEAUTIFUL BILL' ACT IMPACT YOUR RETIREMENT?

Use this checklist to understand how the new law could affect your retirement strategy and help you discuss OBBBA-related updates with your advisor.

		YES	NO
1	I'm enrolled in or nearing eligibility for Medicare.	<input type="checkbox"/>	<input type="checkbox"/>
2	I help care for an aging parent or spouse.	<input type="checkbox"/>	<input type="checkbox"/>
3	I'm retired or planning to retire within the next 10 years.	<input type="checkbox"/>	<input type="checkbox"/>
4	I rely on Social Security as a major income source.	<input type="checkbox"/>	<input type="checkbox"/>
5	I live in a high-tax state.	<input type="checkbox"/>	<input type="checkbox"/>
6	I earn less than \$75,000 (single) or \$150,000 (joint).	<input type="checkbox"/>	<input type="checkbox"/>
7	I'm age 65 or older and file taxes.	<input type="checkbox"/>	<input type="checkbox"/>
8	I'm under 65 and enrolled in Medicaid.	<input type="checkbox"/>	<input type="checkbox"/>
9	I'm under 65 and rely on ACA marketplace health insurance.	<input type="checkbox"/>	<input type="checkbox"/>
10	I'm responsible for my own long-term care planning.	<input type="checkbox"/>	<input type="checkbox"/>

What questions do you want to ask your financial advisor?
