

Planning for retirement milestones.

Retirees and pre-retirees should plan for big decisions as early as age 50.

Retirees need a clear strategy before and after retirement at these key milestones. Work with your New York Life financial professional to navigate through the different key ages, many mandated by government regulations. Let's take a trip with Frank, a 50 year old. He's still working but he's starting to think about what retirement looks like. Let's explore how these milestones will affect Frank.

Important milestones to remember.

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Please consult with a tax or legal advisor. Neither New York Life, its subsidiaries, nor its agents can provide tax or legal advice. Please consult with your advisor before taking any action.

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