How Ready Are You for a Long Life?

A Longevity Readiness Self-Check from Longevity Strategies LLC

A long life is not successful merely because the money lasts. It is successful when the money supports health, independence, purpose, family stability, connection, and legacy.

Longevity planning is not only about investment management. It is also about income, taxes, care, family roles, decision-making, health, purpose, independence, connection, and legacy. Every household is different. This self-check helps you see where your plan may be strong and where a Longevity Readiness Assessment™ may be useful.

Income Security

- Do you know how much income you need each month? ☐
- Do you know how much of that income is reliable? ☐
- Have you estimated the cost of the life you want, including travel, hobbies, learning, giving, health, family support, and home changes? ☐

Tax Efficiency

- Have you reviewed how taxes may change later in retirement? ☐
- Have you considered RMDs, Social Security taxation, Medicare surcharges, survivor status, relocation, asset sales, charitable giving, or part-time work? ☐

Care Planning

- Do you know how future care would be paid for? ☐
- Have you named the people who would make financial and medical decisions if you could not? ☐
- Have you considered the burden on the people who may have to help and discussed it with them? ☐
- Have you considered whether your home, health, mobility, transportation, and daily routines support the independence you want? ☐

Family & Support Preparedness

- Do the right people know what role they may need to play? ☐
- Have you considered where family conflict, disagreement, isolation, or delay could arise? ☐
- Do you have regular sources of social connection, intellectual engagement, purpose, or community outside of work? ☐

Legacy Preservation

- Are your estate documents current? ☐
- Do your beneficiary forms match your wishes? ☐
- Have you defined what you want your legacy to accomplish? ☐

Your score ☐

Checks	Meaning
13–15	Strong foundation, but coordination may still be worth reviewing
9–12	Several areas may need attention
5–8	Important planning gaps may exist
0–4	A guided Assessment is strongly recommended

If your answers suggest important planning gaps, request a short fit conversation to see whether a more detailed Longevity Readiness Assessment™ would be useful.

Longevity Strategies LLC

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