



real

RETIREMENT CHECKLIST

Planning & Research	<input type="checkbox"/> Research Vancouver, WA neighborhoods (e.g., Felida, Fisher's Landing, Cascade Park)
	<input type="checkbox"/> Consider proximity to healthcare, shopping, and recreational amenities
	<input type="checkbox"/> Compare cost of living (housing, taxes, utilities, groceries)
	<input type="checkbox"/> Look into Washington's tax benefits (no state income tax)
	<input type="checkbox"/> Research the climate and seasonal weather patterns
Financial & Legal Considerations	<input type="checkbox"/> Consult a financial planner about retirement income & tax implications
	<input type="checkbox"/> Review property tax rates and potential exemptions for retirees
	<input type="checkbox"/> Explore downsizing options (selling current home vs. renting)
	<input type="checkbox"/> Set up a budget for moving expenses
	<input type="checkbox"/> Update estate planning documents (wills, trusts, power of attorney)
	<input type="checkbox"/> Transfer financial accounts to local banks or credit unions
Housing & Real Estate	<input type="checkbox"/> Decide whether to buy, rent, or explore 55+ communities
	<input type="checkbox"/> Work with a local realtor specializing in relocation 🙋 That's me!
	<input type="checkbox"/> Visit and tour neighborhoods before making a final decision
	<input type="checkbox"/> Research home insurance coverage (I got a great gal to help)
	<input type="checkbox"/> If buying, get pre-approved for a mortgage (if applicable)
	<input type="checkbox"/> Buy a home... We have another Checklist for that
Healthcare & Insurance	<input type="checkbox"/> Find a primary care doctor and specialists in the area
	<input type="checkbox"/> Transfer prescriptions to a local pharmacy
	<input type="checkbox"/> Check Medicare or private insurance coverage for Washington providers
	<input type="checkbox"/> Research local hospitals and urgent care centers
	<input type="checkbox"/> Explore long-term care options (if needed in the future)



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Moving Logistics	<input type="checkbox"/> Hire a reputable moving company or plan a DIY move
	<input type="checkbox"/> Schedule utility transfers (electric, water, gas, internet)
	<input type="checkbox"/> Update mailing address with USPS, banks, and government agencies
	<input type="checkbox"/> Obtain a Washington state driver's license & vehicle registration
	<input type="checkbox"/> Forward medical records to new providers
Lifestyle & Community	<input type="checkbox"/> Get involved in local senior or community centers
	<input type="checkbox"/> Find social groups, hobby clubs, or volunteer opportunities
	<input type="checkbox"/> Explore parks, hiking trails, and outdoor activities
	<input type="checkbox"/> Try out local restaurants, entertainment, and cultural events
	<input type="checkbox"/> Familiarize yourself with public transportation options
Emergency Preparedness	<input type="checkbox"/> Sign up for local emergency alerts
	<input type="checkbox"/> Identify nearest hospitals and emergency services
	<input type="checkbox"/> Prepare for winter weather conditions
	<input type="checkbox"/> Create and review family emergency plan
NOTES	

This Checklist should help make the move to Vancouver, WA seamless!

Let me know if when need assistance with real estate or have any specific concerns. 😊