



THINGS TO CONSIDER: *Before Becoming A Snowbird*

Many retirees will find new freedom in becoming “Snowbirds.” Escaping a colder climate or simply the hustle and bustle of life, Snowbirds travel south for the winter months.

However, before you adopt this lifestyle, here are some things to consider:

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- 1 Assess if a Snowbird lifestyle will fit into your retirement budget.
- 2 Weigh out the impacts of family dynamics and relationships with children and grandchildren. Do you want and expect visitors? Does your spouse?
- 3 Be sure your health insurance has in-network providers near your second residence and that you still have full coverage.
- 4 Confirm that your legal, medical and estate documents are valid in another state.
- 5 Determine if you should rent or own your second home.
- 6 Establish which state will be your primary residence and understand statutory resident and tax rules.
- 7 Assign a person for home maintenance on each property while you are absent to avoid damages that may go unseen.

Relocating full-time or even part-time requires many considerations. Scan the QR code here to learn more about what options you may have!



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YOUR NEXT STEPS

Book your Next Steps meeting at



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(800) 928 - 4001



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We help reduce financial regrets, and few issues are more regrettable than simple strategies that were overlooked and are no longer an option.

Your beneficiaries and your spouse will thank you for investing your time.

*From Our Family to **Yours**, Thank You!*



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