

Top 15 Planning Oopsies

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THE JUNK DRAWER



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SEQUENCE OF RETURNS IGNORED



SOCIAL SECURITY AND MEDICARE



TAXES LOWER DURING RETIREMENT?



THE SOLO YEARS



ESTATE PLANNING



BENEFICIARY ISSUES



LIFE INSURANCE MISTAKES



BUY-SELL AGREEMENT OVERSIGHTS



SICK PAY PLANS



EOLI



RMD



ROTH 401(K) AND ROTH IRA



LONG TERM CARE POLICY LAPSES



MORTGAGE PAYDOWN



HOME EQUITY



NONE ZIP NADA ZILCH



UMBRELLA COVERAGE



CASH BUFFER



UNINTENDED CONSEQUENCES



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