

WHEN SHOULD YOU RETIRE?

SOME SAY IT'S TIME "WHEN YOU HAVE ENOUGH AND YOU'VE HAD ENOUGH."



John Rudi, Partner
The Parr McKnight Wealth
Management Group

THE TRUTH IS ... IT'S AN INTENSELY PERSONAL DECISION. AND THAT'S NOT THE WHOLE TRUTH BECAUSE MANY DON'T GET TO DECIDE.

For example, my dad was forced to retire a few years ago as the result of an accident on the highway (he was a bus driver) that left him unable to continue driving. In some professions, like in the aviation industry, there's a mandatory retirement age. We don't allow 85-year-olds to fly commercial airplanes. 😊

On the other hand, most people get to decide when they retire. Some decide to retire as soon as possible and others decide to work into their 80s and 90s. A great example of the latter is an investment hero of mine, Charlie Munger, who is 96 and runs Berkshire Hathaway as Vice Chair and Warren Buffet's right-hand man.

Bottomline: The right time to retire is when you're financially able and ready to move on to living on your terms. Whether that includes spending more leisure time fishing, out on the golf course, or with family members, or if that means continuing to work for fun, community, and to stay mentally sharp (like Charlie Munger), it's all up to you.

Assessing the "financially able" part of the when to retire question is the science of what we do. Helping clients discern and plan for the activities of daily life in retirement is the art of what we do.

If you're thinking about when to retire, hit reply and send me a note that says "I think I'm ready, let's talk." For the first 10 people who do, I will send a copy of "The New Retirementality" by Mitch Anthony which elaborates on how he believes you can transition into a successful retirement.

*We're at your service.
Best, John*

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