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Travel budget checklist

Traveling has so many benefits; it helps us to learn about new cultures, see new things and broaden our horizons. But traveling without a financial plan is unwise. Use the following list as a guide when planning your vacation.

- ○ Before you decide to put money toward travel, consider making sure you are meeting or exceeding all of your retirement goals. If possible put at least enough into your retirement plan to meet any monetary match they offer.
- ○ Create a new budget that includes monthly travel savings. If you find that money is tight during this process, consider cutting back in other areas of your budget that you don't use or need.
- ○ Research ways to travel more cheaply. For example, traveling during the off-season or by swapping houses with a friend to save on housing.
- ○ If you are finding it hard to fund your new travel savings account, consider taking on a side job to bring in a little extra cash.
- ○ Consider talking to a financial professional who can help you look at your finances and make suggestions based on all of your financial goals.
- ○ Don't forget to include expenditures on visas, travel insurance and vaccinations, if you plan to travel overseas. Research the countries you want to explore by starting with your country's foreign affairs office.
- ○ Be flexible about where you want to travel. Obviously, traveling to exotic locations will cost more than staying local, but you might be surprised by your local offerings.

Stay engaged with your financial professional and take advantage of the tools, articles and resources we've made available to you to maintain your financial plan while in retirement.

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