

AI-04612 Bettina Retirement Planning

Here is a structured, project-management-friendly view of the Bettina Retirement Plan

I've grouped the items into logical project phases based on your timeline and assigned estimated timeframes for the action items that didn't have explicit dates attached.

Project Overview

Project Name: Bettina & Vinny Retirement & Relocation Plan

Target Completion Date: May 27, 2027

Final Destination: Cebu, Philippines

Phase 1: Foundation & Financial Setup

Focus: Administrative, banking, and filing long-lead retirement items.

Item 1.1: Prioritize safety protocols across all tasks

Item 1.2: File for Bettina's Social Security Retirement (Target: Sept 2026)

Item 1.3: Conduct Financial Planning review (Target: Sept 2026/2027)

Item 1.4: Set up Google Voice Number

Item 1.5: Update Fidelity account information

Item 1.6: Update Bank of America account information

Item 1.7: Open a Wise Account

Item 1.8: Open a BPI Account (Cebu)

Phase 2: Home Downsizing & Preparation

Focus: Clearing out the house, packing, and preparing property for sale.

Item 2.1: Source and acquire 10 Balikbayan boxes

Item 2.2: Declutter / Get rid of items – Home Office

Item 2.3: Declutter / Get rid of items – Vinny's Office

Item 2.4: Declutter / Get rid of items – Primary / Master Bedroom

Item 2.5: Declutter / Get rid of items – Kitchen

Item 2.6: Touch up paint and repair house for sale

Phase 3: Transition & Initial Relocation

Focus: Job resignations, primary home sale, and local relocation to 1801.

Item 3.1: Resign Bettina (Target: Dec 2026)

Item 3.2: Sell House (Target: Dec 2026)

Item 3.3: Relocate TV1 + TV2 to 1801 (Target: Dec 2026)

Item 3.4: Full Relocation to 1801 (Target: Jan 2027)

Item 3.5: Finalize 1801 House Interior (Target: Jan 2027)

Item 3.6: Bettina Birthday / Milestone 62 (Jan 2027)

Phase 4: Final Departure & Flight

Focus: Booking, final job exit, and international travel.

Item 4.1: Purchase flight tickets (Target: Jan 2027)

Item 4.2: Resign Vinny (Target: Mar 2027)

Item 4.3: Project Milestone: "All Done" with home wrap-ups (Target: April 2027)

Item 4.4: Flight: Fly from Austin (AUS) Cebu (CEB) (Target: May 27, 2027)

Item 4.5: Arrival in Cebu (Target: May 2027)