

WHAT MATTERS MOST FOR YOUR RETIREMENT

Retirement is not a new concept, but not everyone takes the time to write down what life in retirement might actually look, and feel like. Take your retirement planning to the next level by exploring possible interests and goals that matter to you and your family so you can plan ahead and retire well.

	YES	NO	N/A
Have you written down what your daily and weekly routine might look like in retirement?	☐	☐	☐
Have you set goals for the first 30 days of retirement?	☐	☐	☐
Have you had discussions with your family and friends about your retirement plans and dates?	☐	☐	☐
Have you assessed how your social network may change or be impacted by making a transition into retirement?	☐	☐	☐
Will you be downsizing, relocating or spending time in different locations?	☐	☐	☐
Do you plan to work part time? If yes, do you have a specific job, role or company you plan to work with?	☐	☐	☐
Do you plan to start a business? If yes, is it a business related to your existing work or a current passion or hobby?	☐	☐	☐
Do you plan to volunteer? If yes, do you have a specific job, role or organization you plan to work with?	☐	☐	☐
Do you currently follow an exercise/nutrition routine or program?	☐	☐	☐
Do your retirement plans need to include considerations for an aging parent(s)?	☐	☐	☐
Do your retirement plans need to include considerations for a special needs child or adult child?	☐	☐	☐

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