



# RETIREMENT PLANNING WORKSHEET

## Plan the Retirement You Deserve

### 1. Envision Your Ideal Retirement

A. What does a typical day in retirement look like for you?

- ☐ Traveling      ☐ Volunteering      ☐ Learning something new
- ☐ Starting a new hobby or business   ☐ Spending time with family   ☐ Relaxing at home

Describe in your own words:

B. Where do you want to live in retirement?

- ☐ Stay in current home   ☐ Downsize   ☐ Move closer to family
- ☐ Move to a retirement community   ☐ Travel full-time or live abroad

C. Who do you want to spend your time with?

2. Financial Readiness A. Estimate Monthly Retirement Expenses:

Category Estimated Monthly Costs

Housing \$\_\_\_\_\_

Food & Groceries \$\_\_\_\_\_

Healthcare \$\_\_\_\_\_

Transportation \$\_\_\_\_\_

Travel & Leisure \$\_\_\_\_\_

Other \$\_\_\_\_\_

Total \$\_\_\_\_\_

B. Retirement Income Sources:

☐ Social Security – Est. Monthly: \$\_\_\_\_\_

☐ Pension – Est. Monthly: \$\_\_\_\_\_

☐ Investments – Est. Monthly: \$\_\_\_\_\_

☐ Part-Time Work – Est. Monthly: \$\_\_\_\_\_

☐ Other – \$\_\_\_\_\_

C. Do you have a written retirement budget?

☐ Yes ☐ No ☐ Working on it

### 3. Health & Wellness

A. How will you stay healthy in retirement?

☐ Exercise routine ☐ Healthy eating ☐ Regular medical check-ups  
☐ Mental health support ☐ Social engagement

B. Do you have health insurance or Medicare coverage planned?

☐ Yes ☐ No ☐ Need to research

### 4. Purpose & Passion

A. What gives your life meaning and joy?

B. What do you want to contribute to the world or your family in retirement?

C. Skills or hobbies you'd like to pursue:

## Legacy & Legal Planning

A. Do you have the following in place?

☐ Will ☐ Living Trust ☐ Power of Attorney

☐ Healthcare Directive ☐ Beneficiary designations reviewed

B. Do you want to write your memoir or share your story?

☐ Yes – I want to leave my legacy    ☐ No – Not at this time    ☐ Maybe – Tell me more!

## Action Steps

1.

2.

3.