



Retirement Goals Worksheet

What do you want your retirement to look like? Please take a moment with your spouse to relax and envision the goals that you are working toward in your retirement. It is important to have dreams that are as detailed as possible to truly grasp what it is you are saving for today.

Location

Where do you dream of living after retirement? _____

Do you want to stay in your current home? _____

If so would it be easily adaptable to health changes? _____

If not, how long do you intend to live in your current home? (Until children move out for example) _____

What type of area is appealing to you? (rural, urban, beach, etc) _____

How important is it for you to live near family? _____

Do you wish to travel in retirement? _____

Where? With whom? For how long? How often? _____

Lifestyle

What would you like to reduce or eliminate from your life? _____

What have you always wanted to do?(eg. start your own business, work part time, volunteer) _____

Are there hobbies you would like to pursue?(learning, sports, relaxing and enjoying life) _____

Whom do you want to spend time with? _____

How do you intend to stay healthy and active? _____

Money

How long do you want to continue working? _____

How long do you plan to continue working? _____

Have you calculated what you will need in retirement? _____

How does this compare to the amount you have saved or invested for retirement? _____

What are your greatest financial concerns when it comes to retirement? _____