



RETIREMENT PLANNING

with the Retirement Dr - Joanne Earl

Visit me at:
www.retirementdr.com.au

There are 6 buckets of resources to focus on.

WEALTH



SOCIAL



HEALTH



COGNITION



EMOTIONS



MOTIVATION

Don't forget about career.
How and when you leave matters.

CAREER +



What's one bucket that needs filling?

YOU WILL HAVE 63 HOURS TO FILL PER WEEK IN RETIREMENT

PICK A BUCKET AND INVEST

- A NEW ACTIVITY TO KEEP YOU FIT?
- A BETTER WAY OF KEEPING HEALTHY?
- A NEW TRIBE TO CONNECT WITH?
- LEARNING SOMETHING NEW OR A TRIP TO THE GALLERY?
- SOMETHING TO MAKE YOU FEEL GOOD?
- A REVIEW OF YOUR CURRENT PLAN?
- A NEW WAY TO APPLY YOUR SKILLS?

ALLOCATE HOURS TO EACH OF THE CATEGORIES ON THE NEXT PAGE. ARE YOU OVER OR UNDER 63 HOURS?

Physical – anything that keeps you mobile or flexible

Exercise, gardening, gym (cardio, resistance training), sport (team or individual), walking or jogging, pilates, yoga, dancing

Financial – money management and keeping track of finances

Manage finances, check bank statements, prepare a budget. Checking on portfolio, investments or the performance of funds, paying bills

Social – spending time with other people

Get-togethers, catch-ups at a café or restaurant, fundraising, going to clubs, going to the footy (or other sport), lobbying for a cause, assist the vulnerable, sit on a committee, online chatting (email, social media), volunteering to meet others (emergency services, charity work, animal welfare).

Emotional – keeping your emotions in check and positive

Pursue a passion (e.g., trade, hobby, learn a new skill), play a musical instrument, watching TV (comedy, feel-good shows), meditation, sketching, star gazing, listening to the radio (or podcast), reminisce, sightseeing (e.g., national parks, waterfalls), retail therapy (splurging or window shopping), going for a drive, fishing.

Cognitive – learning new things, keeping your mind active and challenged

Crosswords, play games (e.g., card or board games), Sudoku, take up lessons (e.g., music, language, baking), read, surfing the internet, write (e.g., a book, journal or blog), tutoring or teaching, visiting an art gallery/museum.

Motivational – looking to the future and setting goals

Schedule an event, make a to-do list, mentoring, planning new projects (e.g., building, painting, sewing), conservation work.

*Career – anything to do with applying your skills and knowledge (paid and unpaid)

Volunteering to apply skills, working casually? part-time? Seasonally? For yourself? Someone else?

*Optional

My retirement resources worksheet

Resource Bucket	What I'm going to do	Number of hours allocated this week
Finances		
Health		
Social		
Cognitive		
Emotional		
Motivational		
Career		

Contact details

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