

Retirement Checklist

Physical Health			
Task	Assigned	Start Date	Completed
Complete physical with blood work			

Financial			
Task	Assigned	Start Date	Completed
Social Security estimation			
Pension estimation			
Insurance (Health/Life/Etc.)			
Budget			
Net Worth worksheet			
Will/Trust			
Power of Attorney – Financial			
Power of Attorney – Health			
Emergency Fund			
Legacy drawer			



Emotional/Mental Wellness			
Task	Assigned	Start Date	Completed
See a therapist			
Develop a morning routine			
Develop a gratitude practice (involve others)			
Curiosity Journal			

Spiritual			
Task	Assigned	Start Date	Completed
Develop a personal mission statement			
Develop triggers			

Environment			
Task	Assigned	Start Date	Completed
Decide where to live in retirement			
Work to make primary residence livable			
Develop a plan and structure to my day			



Social			
Task	Assigned	Start Date	Completed
Develop an Opportunity List			
Develop a Travel Plan			
Make a list of things to do with kids/grandkids			
Make a list of things I want to do			
Find opportunities to volunteer			

Leaving a Legacy			
Task	Assigned	Start Date	Completed

General			
Task	Assigned	Start Date	Completed
Discussed my plans with significant other/family			