

Retirement Aspect	Importance	Preparation	Comments
Aging parents			
Asset allocation			
Brain health and fitness			
Bucket List			
Credit card debt			
Decluttering			
Emergency fund			
Emotional preparation for retirement			
Estate planning			
Handoff package			
Identity Theft			
Insurance based annuities			
Investment expense ratios and fees			
Legacy and charity			
Life insurance			
Living revocable trusts			
Long term residency			
Longevity			
Medical directives			
Medicare			
Monthly expenses			
Personal Liability Umbrella Policy			
Pets			
Physical health and fitness			
Retirement paychecks (withdrawals)			
Reverse mortgages			
Risk tolerance and risk capacity			
Roth conversions			
Social Security - when to start			
Username and passwords			
<b>Total</b>			

On scale of 1 to 5, how important is this to you? 5 is the highest. 1 also means it is Not Applicable  
On scale of 1 to 5, how prepared are you for this? 5 is the highest and is also for Not Applicable