

Your Idea of Retirement



It's time to give some real definition to what you hope your retirement will look like. Check everything that applies; you can add other ideas at the end. You can get really specific on page 2.

Location:

- Stay where you are
- Live closer to family
- Live closer to your interests (golf course, mountains)
- Live in a different climate
- Live in a different culture
- Find a lower cost of living

Work:

- Start a new career or business
- Part-time job / Consulting
- Volunteer work

Transportation:

- Keep a primary vehicle
- Use public transportation

Health:

- Focus on a healthy lifestyle
- Deal with current health issues

Mental Stimulation:

- Take classes
- Read books
- Do on-line reading and games

Fun:

- Develop hobbies (crafts, gardening)
- Go to special events (concerts, races)
- Eat out often

Family:

- Visit family often
- Care for grandchildren
- Care for a parent
- Care for a partner

Accommodation:

- Stay in current home
- Downsize
- Pay off the mortgage
- Do home repair projects
- Rent
- Buy vacation property
- Move to an adult community
- Live with family
- Live in an assisted living facility

Travel:

- Travel as often as possible
- Take an occasional vacation
- Buy a motor home

Other Things:

- _____
- _____
- _____
- _____
- _____

My Idea of Retirement



I want to live:

My idea of work is:

My idea of transportation is:

As for my health, I want to:

To stay stimulated mentally, I am going to:

My idea of fun is:

As for my family, I will:

My living situation will be:

My travel plans are:

My other retirement dreams include:
