

What do you want to do over the coming years?

These questions will take some thought and effort to make them valuable and important to retirement income planning process. Think about the things you would like to do over the coming years. Be as specific as possible in terms of activity, location and time frame. For example, 'We would like to go camping with the grandkids and take in some family activities for two weeks in the summer of each year.' 'We would like to travel and stay in a villa in Italy to learn cooking and some Italian for 3 months.' Some activities you will plan on repeating for a period of time. Others will be a "once in a lifetime experience." Please identify the timeframe for each.

Next year

Three years

Five years

Ten years

Longer term dreams and objectives

What other plans do you have? (hobby, volunteer work, avocation, second career, learn new skill)

What is the most important thing that your money gives you today?

What would you like it to provide you tomorrow?

What are the most important things in your life besides your money? Describe the top 3-5 things.

How do your views on money relate to your views on life?

Describe what a "successful retirement" looks like to you?

How might that differ for your spouse/partner?

Who do you know that has "retired successfully"?

What do you think has made their retirement work for them?

What are you looking forward to the most in the next ten years?

Your Spouse/Partner:

What is on our spouse's list that is not on yours?

If you had all the money you could ever use or want, what would be the first five things you would do and why?

Your list:

Spouse/Partner:

1	
2	
3	
4	
5	

What are 10 things that you want to do while you still can?

Your list:

Spouse/Partner:

1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10	10

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