



Pre-Retirement Planning Quiz

This quiz helps you and your spouse consider various aspects of your future retirement life, including lifestyle, finances, health, and family dynamics.

Whether you are a seasoned expert or just beginning, use this to document your current thoughts & any potential actions or areas of follow up.

- a. What do we want our daily routine to look like after retirement?

- b. How do we envision spending our time in retirement?

- c. What type of home do we want to live in (house, condo, apartment)?

- d. Have we calculated how much money we need to retire comfortably?

- e. When do we plan to start drawing Social Security benefits?

- f. How will we handle long-term care or medical expenses?

g. Do we need to update our estate plan and will?

h. How will we ensure that we stay healthy and active in retirement?

i. Should we consider moving closer to children or grandchildren?

j. How do we want to handle family obligations in retirement (helping children, grandkids)?