

# Retirement Action Plan

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**Dare to Dream!**

**This is your Retirement! Take the time to plan it out and do not shortchange yourself on having a successful and meaningful retirement. This is your opportunity to design the next phase of your life, on your terms and according to your dreams!**

[www.yourretirementcoach.ca](http://www.yourretirementcoach.ca)

613-440-2734

Name \_\_\_\_\_ Date \_\_\_\_\_

I want to retire on \_\_\_\_\_

The Objectives for my retirement are...

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

My financial structure is in place for my retirement Y\_\_ N\_\_

I have discussed the state of our finances with my spouse. Y\_\_ N\_\_

I have engaged a financial planner to help with the finances. Y\_\_ N\_\_

I have discussed my retirement plans with my spouse. Y\_\_ N\_\_

I have discussed my retirement plans with my children Y\_\_ N\_\_

Have I made a commitment to getting healthy? Y\_\_ N\_\_

I have made the commitment to finding new activities? Y\_\_ N\_\_

My Health Team includes the following:

Physician\_\_ Physiotherapist\_\_ Chiropractor\_\_ Naturopath\_\_ Dentist\_\_

Massage therapist\_\_ Nutritionist\_\_ Life Coach\_\_ Spiritual councillor\_\_

Personal trainer\_\_

Do I want to move to a new location? Y\_\_ N\_\_

Where to? \_\_\_\_\_

Do I want to travel? Y\_\_ N\_\_

Where to? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Do I want to go back to School? Y\_\_ N\_\_

To study \_\_\_\_\_

## What will I miss the most when I retire from my work?

Money – Routine – Challenge – Satisfaction – Camaraderie – Identity – Purpose – Power – Status

## When I was young, I always wanted to...

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## What projects have I not completed yet?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## I am the happiest when I...

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## If money was no objet, I would be doing...

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**Where do I want to make a difference?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**Things to do in the GO-GO years of my retirement.**

I want to accomplish these by \_\_\_\_\_ 20\_\_

**Things to do in the SLOW-GO years of my retirement.**

I want to accomplish these by \_\_\_\_\_ 20\_\_

**Things to do in the NO-GO years of my retirement.**

I want to accomplish these by \_\_\_\_\_ 20\_\_

**What is preventing me from moving forward with my plans?**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**My dream retirement looks like this...**

**I \_\_\_\_\_ commit 100% to making this come true!**