



Retirement Checklist

What is your **PATH** to a successful retirement?



FIRST ASK ...

- Am I financially comfortable with my current situation?
- How is my debt?
- Have I talked to a financial planner or someone who can give advice?



If you're confident in the above areas, the next step is to think about your **PATH** to retirement.

NOW ASK...

- What do I have **PLANNED** for the first month? First 6 months? First year?
- What **ACTIVITIES** am I interested in doing?
- Who is on my **TEAM**? Do I have a social network?
- How am I going to take care of my **HEALTH**?

MY GOALS...






