



# 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...

- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
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