

**MY SIMPLE**

RETIREMENT PLANNER

# Retirement Check List

- Plan Your Ideal Retirement Lifestyle
- Estimate Lump Sum Required To Fund Lifestyle
- Calculate Value Of Assets You Aim To Have
- Calculate How Much Income Assets Will Create
- Prepare Your Budget
- Adjust Budget For Old People Expenses 😊
- Calculate Weekly / Monthly Retirement Savings Figure & Put Into Budget
- Set Up Automatic Transfer To Specific Account Just For Retirement (& Never Touch It!)
- Investigate Free Money You Are Entitled To (Employer Match, Government Incentives etc.)
- Review Your Retirement Funds Fees & Returns
- Consider Risks and Plan Accordingly (Outliving \$, Share Market Crash, Changes in Retirement Tax Laws etc.)
- Review and Adjust Annually

# Retirement Goals

Think about each of these areas of your life with an old person lens. Picture your daily life and what you hope to be doing each day.

Do you want to volunteer, go out for long lunches, and help with grandkids or even travel? Make your plan below so you can retire with intention.

<b>Family</b>	<b>Friends</b>
<b>Spiritually</b>	<b>Self-Care</b>
<b>Work</b>	<b>Community</b>
<b>Wealth</b>	<b>Travel</b>
<b>Overall Life</b>	

# Retirement Bucket List

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