

RETIREMENT PLANNING CHECKLIST

There are many things to think about before you retire. This checklist can help you consider the areas you should focus on during your transition to retirement.

FINANCES

- Investments
- Superannuation
- Estate Planning
- Debt Position
- Tax
- Government assistance
- Budget planning

HEALTH

- Health Check
- Health Management Directive
- Health Insurance

WORK

- Career transition/change
- Part-time/flexible
- Volunteer/unpaid
- Employment transition options
- Timing

LIFESTYLE

- Lifestyle expectations
- Travel
- Downsize/remain
- Seachange
- Renovate
- Home maintenance
- Vehicle replace/maintain

SOCIAL

- Required new skills
– social or work-related
- Social groups
- Hobbies or activities
- Isolation – physical/emotional

COMMITMENTS

- Family
- Carer responsibility

READINESS

- Is your satisfaction connected to work?
- Do you have energy for work every day?
- Do you have many non-work activities?
- Can you imagine retired life?
- How will your retirement affect your family/friends?

OTHER