

# RETIREMENT PLANNING TOOL

Complete the below table thinking about where you are at today and where you would like to be. Consider the changes you will need to make and take note of any issues or additional support you will need to activate your plan.

	CURRENT STATE	FUTURE STATE	REQUIRED CHANGES	NOTES
How are you feeling?				
Work				
Finances				
Social connections				
Physical activity				
Mindfulness				
Learning				
Giving				