

# MAPPING YOUR RETIREMENT

A Personal Guide to Maintaining Your Health, Managing Your Money, and Living Well

## Worksheets

### INTRODUCTION

- My Retirement Map
- What Are My Priorities?

### LIVING YOUR LIFE

- What Matters to Me?
- What Words Do I Want to Leave?
- Finding Meaning in My Journey
- My Circles of Support
- What Is Important to Me in My Relationships?
- How Will Retirement Affect My Relationships?
- Where Will I Live?
- What Do I Do Now? What Do I Want to Do When I Retire?
- Doing What I Want
- Find the Right Balance
- Matching My Interests with Work Opportunities
- How Will I Contribute?
- Where Can I Have Influence in My Community
- Action Plan for Living Your Life
- Action Steps Worksheet

### MAINTAINING YOUR HEALTH

- I Want to Quit!
- Is Alcohol Affecting My Life?
- Checklist for a Safe Home
- Tracking My Diet for a Week
- Eating Habits I Want to Change
- My Physical Activity and Exercise Plan
- Thoughts about Aging and Retirement
- How Do I Stimulate My Mind?
- Improving My Mental Fitness
- What Will My Insurance Cover?
- Making a Health Care Decision
- Rating the Health Care System
- How Do I Want to Use Nontraditional Therapies?
- Action Plan for Maintaining Your Health
- Action Steps Worksheet

### MANAGING YOUR MONEY

- What Are My Retirement/Life Goals and What Will They Cost?
- My Current Income and Expenses
- My Current Net Worth
- My Future Sources of Income
- What Nonfinancial Resources Do I Have?
- An Inventory of My Investments
- My Portfolio Diversification Plan
- My Contribution Schedule
- Rebalancing My Portfolio
- What Financial Advisors Do I Need?
- My Tax Management Plan
- Will I Have Enough? A Fast-Track Way to Get Thinking
- Will I Have Enough? A More Precise Calculation
- My Withdrawal Plan
- What Do I Want to Include in My Estate Plan?
- My Financial Plan
- Action Plan for Managing Your Money
- Action Steps Worksheet