

## Retirement Goals and Objectives Worksheet

**Instructions:** Use this worksheet as a guide in thinking through your retirement lifestyle plans. Be sure to include your partner in these planning discussions.

<b>Retirement Lifestyle Choices</b> <i>(consider all that may apply)</i>	<i>How would you spend your time in each area?</i>
<input type="checkbox"/> Relaxing; taking life easy	
<input type="checkbox"/> Hobbies	
<input type="checkbox"/> Exercise, sports	
<input type="checkbox"/> Education	
<input type="checkbox"/> Travel	
<input type="checkbox"/> Community involvement	
<input type="checkbox"/> Church involvement	
<input type="checkbox"/> Family	
<input type="checkbox"/>	
<b>Working</b>	<i>Where? In what way(s)? For what reason(s)?</i>
<input type="checkbox"/> Full-time	
<input type="checkbox"/> Part-time	
<input type="checkbox"/> Volunteering	
<input type="checkbox"/>	
<b>Housing</b>	<i>Where? Why?</i>
<input type="checkbox"/> Same home	
<input type="checkbox"/> New home, same area	
<input type="checkbox"/> New home, new area	
<input type="checkbox"/> Specialized Retirement Community	
<input type="checkbox"/>	
<b>Other Issues</b>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Based on everything identified above, write down your overall goals and objectives for retirement. Be as clear and specific as possible. It will be a lot easier to calculate your expenses in retirement if you know what it is you're planning to do with your time and your money.