

**RETIREMENT READINESS CHECKLIST**

CURRENT JOB	Goal / Due Date	Done!	Celebrate
Exit Interview			
Train replacement?			
PHYSICAL HEALTH			
Get major medical work done			
Apply for Medicare (age 65+)			
Talk to HR about retiree health benefits			
DEBT			
Credit Cards paid off			
Car Liens paid in full			
Mortgage paid off			
MENTAL HEALTH			
Retiring TO?			
Social Capital			
Spiritual Capital			
INVESTMENTS			
Risk discussion			
Distribution methods			
Resources			
SPENDING / CASH FLOW			
Monthly needs / household budget			
Taxes accounted for			
Discretionary wishes planned for			
Income sources outlined / understood			