



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			

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