

Union Plus Retirement Goals Worksheet

What do you want your retirement to look like?

Using this worksheet as a guide, set aside some time to relax and envision your retirement future. Simply print out this PDF, then take your time thinking about and writing down your answers and dreams. *(There are no right or wrong answers — and no grades!)*

Your spouse or partner also should complete this worksheet separately; then you can compare and discuss your answers with each other.

HAVE FUN WITH IT!

GETTING STARTED

1. What do you most want to accomplish in retirement? _____

2. Are there lifelong goals you would like to achieve? _____

3. What do you **MOST** look forward to in retirement? _____

4. What do you **LEAST** look forward to in retirement? _____

LOCATION

1. Do you want to stay in your current home for the rest of your life, if possible? _____

2. If not, how long do you want to stay in your current home? *(Until children are out of the house, for example):* _____

3. If you want to stay in your home, will it be easily adaptable in the case of health challenges? *(For example, will you have to climb stairs, are you close to health care providers, do you have family or neighbors nearby who can check in on you if you have surgery, etc.)* _____

4. Do you want to retire to another city or state? If so, what area(s) are attractive to you? _____

5. What type of area is appealing to you *(city, rural, retirement community, college town)?* _____

6. Have you tried living in another area for extended periods of time *(at least three months or more, and in different seasons)?* _____

7. How important is it for you to live near family? _____
8. Do you want to travel extensively in retirement? _____
Where? *(Live in an RV for extended times, or overseas, for example?)* _____
Whom do you want to travel with? _____
How many trips would be ideal for you and how long would you travel? _____

LIFESTYLE

1. Whom do you want to spend time with? _____
2. How will you meet new people? _____
3. Rate the following activities in terms of importance to you in retirement:
1 = very important
2 = somewhat important
3 = not important
____ Time with family, including children/grandchildren
____ Time with friends
____ Learning (*taking classes, reading, learning a new skill, etc.*)
____ Hobbies (*gardening, camping, theatre, painting, computers, etc.*)
____ Fitness and sports (*golf, dance, yoga, biking, etc.*)
____ Travel (*in the United States, overseas*)
____ Working (*part time or full time*)
____ Volunteering or becoming an activist (*political organizations, place of worship, charitable organizations, mentoring, etc.*)
____ Starting a business

MONEY

1. How long do you **WANT** to continue working? _____

2. How long do you **PLAN** to continue working? _____

3. Have you calculated what you will **NEED** in retirement? _____

4. Have you estimated what you will **HAVE** in retirement? _____

5. Do you feel comfortable with the amount of retirement financial planning you have done so far? _____

6. Do you feel comfortable with the amount of money you have saved or invested for retirement? _____

7. What are your greatest financial concerns when it comes to retirement? _____
