

My Retirement Action Plan

Whether you are already retired or are years away from retirement, it is important to think about your retirement goals and how you would like to spend your time. Use this action plan to help you discover your vision and plan for your present or future retirement.

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My Retirement Vision

Describe a realistic, but ideal vision for your retirement. For this exercise, try to think more broadly than financial aspects of your retirement.

In order to help you achieve your vision, identify items you would like to accomplish in each of these four categories. Try to make your goals as specific as possible (instead of saying “socialize more”, try “I will attend a book club with my friends once per month.”).

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Develop and Maintain Positive Relationships

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- _____
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Live a Healthy Lifestyle

Strive to Achieve Balance

Continue Planning for My Future