

Are We There Yet? Readiness Self Check



I have a financial plan in place:	yes	no
I know exactly when I want to retire:	yes	no
My spouse and I have discussed retirement goals:	yes	no
I know how much I spend:	yes	no
I stick to a budget:	yes	no
Our household has extra money left over at month end:	yes	no
I have an emergency fund:	yes	no
I know where my health insurance will come from:	yes	no
I have an idea how much health insurance will cost:	yes	no
I plan on getting a part time job:	yes	no
Such as: _____		
There are activities I want to do in retirement:	yes	no
Such as: _____		
I want to travel:	yes	no
I want a second home/snow bird:	yes	no
I want to "age in place" where I'm living now:	yes	no
I want to downsize/upsized my home:	yes	no
I want to live closer to family:	yes	no
I know where all my money is located:	yes	no
I know how to access all my money:	yes	no
I am familiar with my investment asset allocation:	yes	no
I know what happens if my spouse or I become incapacitated:	yes	no
I want to leave money to my kids/family when I'm gone:	yes	no
I have someone I trust who I can ask financial opinions:	yes	no