



HOW DO I STAND?

Advance planning is essential for a satisfying retirement. There are a number of steps which may be taken to make adjustments smoother. How many of the following questions can you already answer?

1. What will be my sources of income in retirement?

University Pension	\$ _____
Social Security	_____
Savings Accounts	_____
Stocks	_____
Life Insurance	_____
Real Estate	_____
Other Sources	_____

TOTAL \$ _____

2. How much money will I need in retirement?

Housing	\$ _____
Food	_____
Clothing	_____
Medical Care	_____
Transportation	_____
Taxes	_____
Cell Phone	_____
Internet Access	_____
Other	_____

TOTAL \$ _____

- | | | | | |
|---------------------------------------------------------------------------------------------------------------------|-----|--------------------------|----|--------------------------|
| 3. Have I discussed retirement plans with my family? | YES | <input type="checkbox"/> | NO | <input type="checkbox"/> |
| 4. Do I have important papers (including my will) together, where my family can find them? | YES | <input type="checkbox"/> | NO | <input type="checkbox"/> |
| 5. Will I need or want to work after retirement? | YES | <input type="checkbox"/> | NO | <input type="checkbox"/> |
| 6. Have I had a physical examination in the past year? | YES | <input type="checkbox"/> | NO | <input type="checkbox"/> |
| 7. Have I thought about where to live? | YES | <input type="checkbox"/> | NO | <input type="checkbox"/> |
| 8. What interests do my spouse and I share apart from those related to our family?
_____ | | | | |
| 9. What do I plan to do after retirement to provide the same satisfactions I now receive from my work?
_____ | | | | |
| 10. What activities and facilities are available to me in my community?
_____ | | | | |
| 11. What do I have planned in the near future that is new or different?
_____ | | | | |
| 12. Do I know where to find assistance in planning for any of the areas where I have not had a satisfactory answer? | YES | <input type="checkbox"/> | NO | <input type="checkbox"/> |