



RETIREMENT CHECKLIST & NON FINANCIAL CONTRIBUTIONS

INCOME PLANNING

	Yes	No
1. I have claimed social security.	<input type="checkbox"/>	<input type="checkbox"/>
2. I have a pension	<input type="checkbox"/>	<input type="checkbox"/>
3. What are your pension options?		
<hr/> <hr/>		
4. What is your PTO system and how will that be paid out?		
<hr/> <hr/>		
5. What is your vacation time policy and how will that be paid out?		
<hr/> <hr/>		
6. Are there any bonuses to be aware of?		
<hr/> <hr/>		
7. Will there be any disability insurance from the old employer, or does that coverage end at employment?		
<hr/> <hr/>		

INVESTMENT PLANNING

8. I have maxed out my 401k.	<input type="checkbox"/>	<input type="checkbox"/>
9. I have received my last match from my employer.	<input type="checkbox"/>	<input type="checkbox"/>
10. I have stock options, RSU's, ESOP's, etc.	<input type="checkbox"/>	<input type="checkbox"/>
11. I have a cash balance plan.	<input type="checkbox"/>	<input type="checkbox"/>



Non-Financial Considerations For Retirement



	Yes	No
I want to spend more time travelling in retirement.	<input type="checkbox"/>	<input type="checkbox"/>
I want to find a part-time job in retirement.	<input type="checkbox"/>	<input type="checkbox"/>
I want to learn a new hobby in retirement.	<input type="checkbox"/>	<input type="checkbox"/>
I want to focus on my health and fitness in retirement.	<input type="checkbox"/>	<input type="checkbox"/>
I want to spend more time with my family in retirement.	<input type="checkbox"/>	<input type="checkbox"/>
I want to volunteer in my community in retirement.	<input type="checkbox"/>	<input type="checkbox"/>
I want to go on a mission trip in retirement.	<input type="checkbox"/>	<input type="checkbox"/>
I want to learn a new sport in retirement.	<input type="checkbox"/>	<input type="checkbox"/>
I want to purchase a second home in retirement.	<input type="checkbox"/>	<input type="checkbox"/>
I want to go to the beach regularly in retirement.	<input type="checkbox"/>	<input type="checkbox"/>
I want to spend more time at home in retirement.	<input type="checkbox"/>	<input type="checkbox"/>

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