



# RETIREMENT CHECKLIST



As you start to think about your retirement, there are some questions you need to ask yourself and information that you need to gather. Having the answers to these questions may help you to make the most of your guidance session or initial meeting with an Independent Financial Adviser – we hope you find this checklist useful to help you do this:

- I know how much I have in all my pension plans
- I think I may have pension plans from old jobs and I need to find them
- I know what other savings I have



Source	Policy Number	Amount	When can it be released?



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- I know what my on going bills are going to be

Type	Amount per month/annum
Gas/Electricity	
Water	
TV	
Council Tax	
House Insurance	
Car Insurance	
Car Tax	
Food	
Leisure/holidays	

- I know when my mortgage gets paid off
- I know whether I need to continue working in some capacity
- I know what financial support the children still need from me



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- I know what debts I have and how long it will take to pay them off

Company	Ref number	Amount left	Paid off by

- I know what other income is coming into the house

Source	Amount	Frequency

- I understand what the financial impacts are of any health issues that I may have or may develop

- I know what sort of lifestyle I want in retirement e.g. holidays, leisure activities and what this will cost