

RETIREMENT: YOURS, MINE, AND OURS

Ready to get in sync with your spouse on retirement? Separately fill out this questionnaire (no peeking at each other's work!), then prepare to compare notes.

At what age will we retire?

SELF: _____

SPOUSE: _____

What do I look forward to?

Rate these activities in order of importance (1 to 6):

- Sports/Recreation _____
- Travel _____
- Hobbies _____
- Volunteer Work _____
- Being with Friends _____
- Family Time _____

How much will we see each other on a typical day?

- A glimpse over breakfast/dinner
- A few hours a day, but we will need space
- We will stick like glue

Where do I want to live?

- Warm place? Close to Kids?
- Smaller home in same town?
- Right here?

How will my responsibilities change around the house?

Mark how the burdens will shift for each:

	MORE	LESS	NO CHANGE
Household chores?	_____	_____	_____
Money management?	_____	_____	_____
Social plans?	_____	_____	_____
Meal preparations?	_____	_____	_____
Shopping?	_____	_____	_____

How much do we have in our retirement accounts?

\$ _____

How much do we need?

\$ _____

If one of our kids asks for money, what would I do?

- Help if we don't feel the impact
- Help even if it meant cutting back on dinners out
- Probably say NO

Will I work part-time?

_____ YES

_____ MAYBE

_____ DEFINITELY NOT-
I'LL BE RETIRED!

ALL
DONE?

It's time to look over your spouse's responses. Those that differ the most from your choices are the ones you need to spend the most time discussing.