



# Retirement Action Planning Worksheet

## Getting the Most out of Retirement Living!

### Introduction

From my perspective, getting the most out of retirement living means being *intentional* about small moments of enjoyment as well as bigger planned activities and events. It means creating conditions to experience success, enjoyment, satisfaction, and a sense of belonging. It means feeling like you are being true to yourself. It means reaping the fullest benefits possible from the experience.

The key to preparing for a retirement life you will love is to “begin with the end in mind” then create the path to get there. However, sometimes goals can be too big and then become overwhelming. For now, I want you to think of what you can do for yourself in the next 2-6 months to take steps to creating a fulfilling and successful transition to retirement.

Part of creating an action plan for these next steps toward retirement is also figuring out ways we can successfully overcome barriers or roadblocks to doing what we really want to do.

**Before** getting started, it would be useful for you to reflect on your life priorities, resources and strengths. Use these as the basis for creating a personal retirement action plan. Remember to choose actions that will most likely to fulfill your priority needs right now as well as provide you with the greatest possibility of setting yourself up for success in your transition to retirement.



## My Next Steps Retirement Action Plan (RAP)

**My Goal(s):** The 1-3 things most important to me to focus on in the next two-six months as I transition to retirement:

- 1.
- 2.
- 3.

**For each, ask yourself:** Is/are my Goal(s):

- Meaningful to me?
- Enjoyable?
- Do-able?

How **confident** am I that I will accomplish my goal(s) in the next six months? (0 = **Not at all confident** to 10 = **Extremely confident**)

**Note:** If you rated your confidence at 6 or lower, rework your goals to ensure it is something you are more confident that you will actually accomplish!

**A = ACTION PLAN:** Steps I need to take to achieve my goals include (e.g., what do I need to do/find out before I can get started? e.g., find out costs, transportation, supplies needed): number them in order they should be completed.

**Next Steps for Goal 1:**

**Next Steps for Goal 2:**

**Next Steps for Goal 3:**

**P = PROBLEM SOLVE:**

<b>What might prevent me from achieving my goals?</b>	<b>How I can overcome these potholes and roadblocks?</b>

