



Retirement planning



Being clear about your priorities

Determining what you want in retirement living takes serious thought. So what's important to you? What do you value most about where you live? And what kind of things do you like to do with your time, energy and talents? What makes life fun and truly fulfilling for you? Before you begin to compare your different options for the future, it's important to have a clear picture of the way you want to live in your retirement years.

<u>Where I live: What matters most to me</u>	<i>Very Important</i>	<i>Somewhat Important</i>	<i>Not Very Important</i>
Staying in or near my current neighborhood, town or city	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Living around people in my age group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Having families and children as neighbors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Being close to entertainment and shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Living close to cultural venues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Having a variety of dining choices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Living in a small or moderate-size apartment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Living in a large apartment or freestanding home	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Being part of a friendly community	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Having plenty of privacy when I want it	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Being in a pet-friendly environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Having all interior/exterior maintenance provided	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Having interesting things to do	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Living close to family members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feeling safe in my home and neighborhood	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Having quality health care available if I need it	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Having predictable living expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Making my own choices and decisions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feeling true peace of mind about the future	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Protecting my estate for my loved ones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to entertain or host gatherings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to cook and bake	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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How I live: What matters most to me

These are the activities and opportunities I want convenient access to:

Arts and crafts	<input type="checkbox"/>	Painting	<input type="checkbox"/>
Board games	<input type="checkbox"/>	Photography	<input type="checkbox"/>
Book club	<input type="checkbox"/>	Pottery	<input type="checkbox"/>
Bridge	<input type="checkbox"/>	Reading	<input type="checkbox"/>
Business and investment	<input type="checkbox"/>	Religious services	<input type="checkbox"/>
Cardiovascular exercise	<input type="checkbox"/>	Running	<input type="checkbox"/>
Computers/Internet/technology	<input type="checkbox"/>	Sporting events	<input type="checkbox"/>
Continuing education	<input type="checkbox"/>	Swimming	<input type="checkbox"/>
Cultural excursions/activities	<input type="checkbox"/>	Tai Chi	<input type="checkbox"/>
Dancing	<input type="checkbox"/>	Theater/symphony/ballet	<input type="checkbox"/>
Dining options	<input type="checkbox"/>	Travel	<input type="checkbox"/>
Educational opportunities	<input type="checkbox"/>	Volunteer opportunities	<input type="checkbox"/>
Fitness/exercise	<input type="checkbox"/>	Walking	<input type="checkbox"/>
Gardening	<input type="checkbox"/>	Weight training	<input type="checkbox"/>
Golf	<input type="checkbox"/>	Woodworking	<input type="checkbox"/>
Group classes	<input type="checkbox"/>	Writing	<input type="checkbox"/>
Hiking	<input type="checkbox"/>	Yoga	<input type="checkbox"/>
Music appreciation	<input type="checkbox"/>	Other	
Music: playing an instrument	<input type="checkbox"/>	_____	
Music: singing	<input type="checkbox"/>		