

MARRIAGE & PARTNERSHIP

Enhancing Togetherness In Your Golden Years




	YES	NO
1 Do you discuss financial planning with your partner regularly?	<input type="checkbox"/>	<input type="checkbox"/>
2 Have you established common retirement goals with your spouse?	<input type="checkbox"/>	<input type="checkbox"/>
3 Do you feel that your relationship has adapted well to retirement?	<input type="checkbox"/>	<input type="checkbox"/>
4 Do you and your partner allocate time for individual interests?	<input type="checkbox"/>	<input type="checkbox"/>
5 Have you discussed your health care plans with your partner?	<input type="checkbox"/>	<input type="checkbox"/>
6 Do you engage in new activities together to keep the relationship dynamic?	<input type="checkbox"/>	<input type="checkbox"/>
7 Are you and your partner open about your fears and expectations in retirement?	<input type="checkbox"/>	<input type="checkbox"/>
8 Do you have a plan in place for managing potential caregiving needs?	<input type="checkbox"/>	<input type="checkbox"/>
9 Do you feel supported by your partner in your retirement decisions?	<input type="checkbox"/>	<input type="checkbox"/>
10 Have you reviewed your legal and estate plans together?	<input type="checkbox"/>	<input type="checkbox"/>

QUESTIONS? CONTACT YOUR FINANCIAL ADVISOR



THE CENTER FOR
RETIREMENT READINESS

What Your Answers Might Mean:

-  **7–10 Yes Answers:** Robust Partnership. You and your partner are well-aligned and prepared for the future, showing strong mutual support and understanding.
-  **4–6 Yes Answers:** Progressing Together. You are on the right track, but further alignment on retirement planning could enhance your partnership.
-  **0–3 Yes Answers:** Focus Needed. It may be crucial to address foundational areas in your relationship to ensure both are prepared and secure in retirement plans.