

# RETIREMENT BUCKET LIST

*Turning Dreams Into Reality During Your Golden Years*

|   | YES                      | NO                       |
|---|--------------------------|--------------------------|
| 1 Have you written down a list of places you want to visit during your retirement?                            | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 Do you have a plan for achieving any specific hobbies or skills you wish to acquire?                        | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 Have you budgeted for the activities on your bucket list to ensure financial feasibility?                   | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 Do you review and update your bucket list regularly to reflect your current interests and abilities?        | <input type="checkbox"/> | <input type="checkbox"/> |
| 5 Have you discussed your bucket list goals with your partner or family to see if there are shared interests? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 Are you physically prepared to undertake the activities listed on your bucket list?                         | <input type="checkbox"/> | <input type="checkbox"/> |
| 7 Have you researched the best times or seasons for the experiences on your list?                             | <input type="checkbox"/> | <input type="checkbox"/> |
| 8 Do you have a savings or investment plan specifically for your bucket list activities?                      | <input type="checkbox"/> | <input type="checkbox"/> |
| 9 Have you considered any potential obstacles, such as health limitations, and planned how to address them?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 10 Are you confident that you can start ticking items off your bucket list within the next year?              | <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:** Well-Prepared for Bucket List Adventures. You have thoughtfully prepared for fulfilling your retirement dreams, ensuring that you can enjoy your adventures without financial or practical concerns.



**4–6 Yes Answers:** Some Planning Complete, More Needed. You have a good start on planning for your bucket list, but additional details and financial strategies could enhance your ability to accomplish these goals.



**0–3 Yes Answers:** Immediate Planning Necessary. It's crucial to start planning how to realize your bucket list dreams to make the most of your retirement years and avoid potential regrets.