



Lifestyle Assessment and Financial Planning

Blow it up big and use post it notes, replicate it on a whiteboard (virtual or actual), use it however works for you!

<u>Need</u>	<u>Yes</u>	<u>No</u>	<u>Actions I need to take</u>
I know how much money I have spent, and on what, over the past three years.			
I know what I can expect as annual income in my encore.			
If there is a gap, I have a plan for additional income.			
I have had a full financial review in the last six months with an independent financial advisor.			
I have analysed where I will need to adjust my lifestyle and expenditures, and I know how I plan to do that.			
I have discussed my financial plans with my significant other and/or family members who need to know.			
I have completed all the relevant legal documents and shared them as appropriate with family members.			
I have had a complete physical exam within the last six months.			
I have taken a hard look at my lifestyle and identified where I need to make choices			
I have a plan for how I will stay committed to these choices.			
I believe that my current home will meet my encore needs.			
I have plans to move home and know what needs to be done.			
I feel confident that my basic needs, both from a lifestyle and financial point of view, will be adequately met in my encore.			