Planning for Tim’s Retirement

| # | Question | Tim’s Answer | Linda’s Answer |
| --- | --- | --- | --- |
|  |  | Alone | Together | Alone | Together |
| 1 | What types of activities should we do? |  |  |  |  |
|  | * Morning activities
 |  |  |  |  |
|  | * Afternoon activities
 |  |  |  |  |
|  | * Evening activities
 |  |  |  |  |
| 2 | What home responsibilities should each of us have? |  |  |  |  |
|  | * Cooking
 |  |  |  |  |
|  | * Maintenance – list types
 |  |  |  |  |
|  | * Laundry
 |  |  |  |  |
|  | * Bill paying
 |  |  |  |  |
|  | * Dishes
 |  |  |  |  |
|  | * Landscaping care
 |  |  |  |  |
|  | * Travel planning
 |  |  |  |  |
|  | * Financial planning
 |  |  |  |  |
|  |  |  |  |  |  |
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|  |  |  |  |  |  |
| 3 | How often do you expect we’ll do these types of travel? |  |  |  |  |
|  | * More time with grandkids
 |  |  |  |  |
|  | * Long weekends
 |  |  |  |  |
|  | * Day trips
 |  |  |  |  |
|  | * Longer vacations
 |  |  |  |  |
|  | * Snowbird in Florida (or Arizona)
 |  |  |  |  |
|  | * Holidays in Arizona
 |  |  |  |  |
| 4 | How should we spend money? |  |  |  |  |
|  | * What additional expenses do you foresee?
 |  |  |  |  |
|  | * What expenses will go away?
 |  |  |  |  |
|  | * How should we manage where we spend our money?
 |  |  |  |  |
|  | * What large expenses might we have?
 |  |  |  |  |
| 5 | How much should we eat our meals out? |  |  |  |  |
|  | * Breakfast
 |  |  |  |  |
|  | * Lunch
 |  |  |  |  |
|  | * Dinner
 |  |  |  |  |
| 6 | What other expectations do you have? |  |  |  |  |
|  | * Sleeping schedule
 |  |  |  |  |
|  |  |  |  |  |  |
|  |  - |  |  |  |  |
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