Planning for Tim’s Retirement

| # | Question | Tim’s Answer | | Linda’s Answer | |
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|  |  | 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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