



Leap Retirement Coaching (www.LeapRetirement.com)

Pre-Retirement Planning Assessment

Fillable Workbook

This assessment will guide you and your spouse or partner through key areas of retirement planning, including lifestyle, finances, health, and family dynamics. Use it to reflect, align, and identify any next steps as you prepare for a fulfilling retirement.

1. Daily Lifestyle

What do we want our typical day to look like in retirement?

Morning, afternoon, evening routines, balance of rest and activity

2. Use of Time

How do we envision spending our time in retirement?

Hobbies, travel, learning, volunteering, social life

3. Living Environment

What type of residence do we see ourselves in?

☐ House

☐ Condo

☐ Apartment

☐ Retirement Community

☐ Other: _____

Additional thoughts on where and how we want to live:

4. Financial Preparedness

Have we estimated how much we'll need to retire comfortably?

- ☐ Yes
- ☐ In progress
- ☐ Not yet

Key considerations, questions, or concerns:

5. Social Security Planning

When do we plan to begin drawing Social Security benefits?

- ☐ Age 62
- ☐ Full retirement age
- ☐ Age 70
- ☐ Not sure

Reasoning behind our choice or questions we still have:

6. Healthcare & Long-Term Care

How will we manage healthcare and long-term care expenses?

- ☐ Medicare only
- ☐ Supplemental insurance
- ☐ Long-term care insurance
- ☐ Self-funded savings
- ☐ Not sure

Plans or concerns:

7. Estate Planning

Have we reviewed and updated our estate plan?

- ☐ Yes, recently
- ☐ Needs to be updated
- ☐ Not yet created

Next steps or items to review:

8. Health & Wellness

How will we stay healthy and active in retirement?

- ☐ Exercise routine
- ☐ Regular checkups
- ☐ Healthy eating
- ☐ Mental health & social engagement
- ☐ Other: _____

Our health goals and strategies:

9. Proximity to Family

Should we consider moving closer to children or grandchildren?

- ☐ Yes
- ☐ Maybe
- ☐ No
- ☐ Not sure

Factors influencing this decision:

10. Family Responsibilities

How do we want to handle family obligations in retirement?

- ☐ Financial support for children
- ☐ Helping with grandchildren
- ☐ Occasional caregiving
- ☐ We prefer to minimize obligations
- ☐ Other: _____

What boundaries or expectations should we discuss?

Summary & Next Steps

What follow-up actions or conversations should we prioritize?
