



Couples Retirement Assessment

Powerful assessment to deepen & improve your relationship with your significant other and your children.

Couples Plan

- ☐ Retirement date: Do you have a definitive date when one or both of you plan to retire?
- ☐ Retirement budget: Do you have a specific dollar amount you plan to live on each month or year?
- ☐ Time spent with family: Do you agree on how much time you will spend with family?
- ☐ Time spent together and apart: Do you have specific days or times in which you will be apart from each other?
- ☐ Combined social network: Do you as a couple have friends you both enjoy spending time with?
- ☐ Your social network: Do you have friends that you spend time with without your partner?
- ☐ Partner's social network: Does your partner have friends that he/she spends time with on her/his own?
- ☐ Moving: Do you agree on where you plan to live in retirement?
- ☐ Spirituality: Do you share the same spiritual beliefs?
- ☐ Religious Activities: Do you plan to participate in organized or other religious activities together?
- ☐ Legacy wealth: Is there a written estate plan in place (Will, trust, durable & medical powers of attorney)?
- ☐ Legacy Wisdom: Are there written documents to pass on family values, wisdom, and more personal aspects of your legacy? (If not, here is a [Free Legacy Document](#))
- ☐ Hobbies and passions: Do you have hobbies or passions you plan to participate in?

- ☐ Partner hobbies and passions: Do you and your partner have shared hobbies or passions you plan to participate in?
- ☐ Volunteering: Do you intend to volunteer?
- ☐ Volunteering: Does your partner have a plan to volunteer?
- ☐ Work: Do you intend to work in retirement? (Part-time, seasonal gig, entrepreneurship)
- ☐ Partner work: Does your partner intend to work in retirement?
- ☐ Cognitive Engagement: Do you have a plan to stay mentally engaged?
- ☐ Physical health: Is there a plan to start or continue an exercise routine in retirement?
- ☐ Partner's physical health: Is there a plan for your partner to start or continue an exercise routine in retirement?
- ☐ Nutritional health: Do you have a healthy / balanced diet?
- ☐ Partner's Nutritional health: Does your partner have a healthy / balanced diet?
- ☐ Household chores: Do you agree on the division of household chores in retirement?
- ☐ Travel: Is there a plan for how often you may travel each year?
- ☐ Travel Budget: Is there a plan for how much money you will allocate for travel?
- ☐ Aging parent: Do you have an aging parent(s) that may impact your retirement?
- ☐ Family dynamics: Are there other family issues that may require additional planning (special needs, health, blended family, siblings)?
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Couples Relationship with one another

- ☐ It takes work to keep relationships healthy. Compare & discuss answers with Spouse or significant other to take a big step in improving yours.
- ☐ How much do they really understand the way you feel about things?
- ☐ How much can you rely on them if you have a serious problem?
- ☐ How much can you open up to them if you need to talk about your worries?
- ☐ How much do they criticize you? Seldom
- ☐ How much do they let you down when you are counting on them?
- ☐ How close is your relationship with your partner or spouse?
- ☐ How enjoyable is the time you spend together with your spouse/partner?
- ☐ In your free time, do you and your spouse mostly do things together or separately?

Complete this Section if you have Living Children

- ☐ Do your children understand how you feel about things?
- ☐ How much can you rely on your children if you have a serious problem?

- ☐ How much can you open up to children if you need to talk about your worries?
- ☐ How often do your children make too many demands of you?
- ☐ How much do your kids criticize you?
- ☐ How much do they let you down when you are counting on them?
- ☐ How much do they get on your nerves?
- ☐ On average, how often do you meet up with your children?
- ☐ On average, how often do you speak on the phone with your children?
- ☐ On average, how often do you write, email or text with your children?
- ☐ Would your children say they have a close relationship with you?

Reflecting on the assessment, what areas do you feel need work?

These questions may trigger various ideas and emotions. It's good practice to recognize them & take note.

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