

## Retirement Planning Checklist



Start thinking about your future lifestyle. What do you want to do and how much does it cost?



Work out your spending plan. How much do you spend now and how will this change when you stop work?



Do you know when you would like to have stopped work by?



Gather up to date values on your existing wealth. This may include cash savings, investments and pensions. This will allow you to understand your current position.



Check your state pension forecast. You can do this online via the gov.uk website or by printing a BR19 form and posting.



Have you considered out of the ordinary expenditure such as holidays, new cars, or possibly helping kids with weddings or home deposits?



Seek help from a financial planner if you need help visualising how your financial future may look and if your future lifestyle is sustainable.



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