

Retirement **TRANSFORMED**

WITH MARK & JODY ROLLINS

1 YEAR FROM RETIREMENT *CHECKLIST*

**ARE YOU GETTING
CLOSER TO RETIREMENT
AND FEELING OVERWHELMED?**

Use this checklist as a guide for everything you need to do one year before you retire.



Start planning for and
get excited about the
best years of your life!

retirementtransformed.com

Career Closeout Checklist:**Review Employee Benefits****Deadline****Notes**

- ☐ 1. Meet with Human Resources
- ☐ 2. Review Pension Benefits
- ☐ 3. Review 401K Status
- ☐ 4. Review Health Insurance
- ☐ 5. Review Cobra Options
- ☐ 6. Identify any available outboarding support
- ☐ 7. Other:

Notify Your Network**Deadline****Notes**

- ☐ 1. Establish your transition/replacement plan
- ☐ 2. Notify Leadership Team
- ☐ 3. Notify Teammates
- ☐ 4. Notify Clients
- ☐ 5. Mentor colleagues to empower success in your absence
- ☐ 6. Give people a chance to say goodbye
- ☐ 7. Other:

Transition Comms. Tools to Personal Accounts**Deadline****Notes**

- ☐ 1. Create/Reactivate Personal Email Account
- ☐ 2. Transition All Logins that you'll need in retirement from business email to personal email
- ☐ 3. Make a list of the people you want to stay in touch with
- ☐ 4. Forward Important emails to personal acct.
- ☐ 5. Other:

Gather Historical Records (when compliant)**Deadline****Notes**

- ☐ 1. Collect past presentations
- ☐ 2. Collect work product
- ☐ 3. Gather letters of recommendation
- ☐ 4. Save past resumes or professional bios
- ☐ 5. List out all your professional accomplishments
- ☐ 6. Other:

Personal Checklist:**Get Your Financials in Order****Deadline****Notes**

- ☐ 1. Hire a Financial Planner
- ☐ 2. Review all Estate Planning Documents
- ☐ 3. Meet with accountant/tax advisor
- ☐ 4. Other:

Build Alignment with Family/Friends**Deadline****Notes**

- ☐ 1. Share your Retirement Plans with Family
- ☐ 2. Share your Retirement Plans with Friends
- ☐ 3. Share your Retirement Plans with Colleagues
- ☐ 4. Share your Retirement Plans with Partner
- ☐ 5. Other:

Make Some Lists**Deadline****Notes**

- ☐ 1. Home to do list - Repairs, etc...
- ☐ 2. Personal to do list - things you've been putting off until "tomorrow"
- ☐ 3. Travel Wish List - be creative
- ☐ 4. Doctor Visit List
- ☐ 5. Second Act/Career Brainstorming List
- ☐ 6. Other:

Journal/Explore/Consider the Following Items**Deadline****Notes**

- ☐ 1. Consider taking a Gap Year
- ☐ 2. If you have a partner, begin envisioning what your retirement will look like together
- ☐ 3. Reach out to your "retired" network and start scheduling regular meetups
- ☐ 4. What sort of volunteering could you do?
- ☐ 5. Donate your old work wardrobe
- ☐ 6. Buy a new wardrobe to look and feel good
- ☐ 7. Other:

First Week At Home Checklist:

Celebrate Your Career

Deadline

Notes

- ☐ 1. Plan a celebration with your inner circle
- ☐ 2. Take stock of your career highlights
- ☐ 3. Send thank you notes to those who enabled your career highlights (practice gratitude)
- ☐ 4. Treat yourself and indulge
- ☐ 5. Be kind to yourself, embrace all the emotions
- ☐ 6. Other:

Enjoy Your Freedom

Deadline

Notes

- ☐ 1. Set up weekly coffee with friends
- ☐ 2. Go browse a bookstore
- ☐ 3. Take an online course
- ☐ 4. Walk around your village
- ☐ 5. Explore a new hobby
- ☐ 6. Engage in an existing hobby
- ☐ 7. Clean closets, basement, garage or attic
- ☐ 8. Other:

Establish Some New Routines and Habits

Deadline

Notes

- ☐ 1. Design a new morning routine
- ☐ 2. Purchase a journal and start writing/reflecting
- ☐ 3. Sit still with your thoughts and practice meditation
- ☐ 4. Pick one 20-minute activity that gets you moving your body
- ☐ 5. Other:

Start Creating your New Identity

Deadline

Notes

- ☐ 1. Create a new electronic contact card
- ☐ 2. Write your Story. What led you to this moment?
- ☐ 3. Brainstorm your new identity. Think “retired” vs “transformed”
- ☐ 4. Other: