Retirement TRANSFORMED

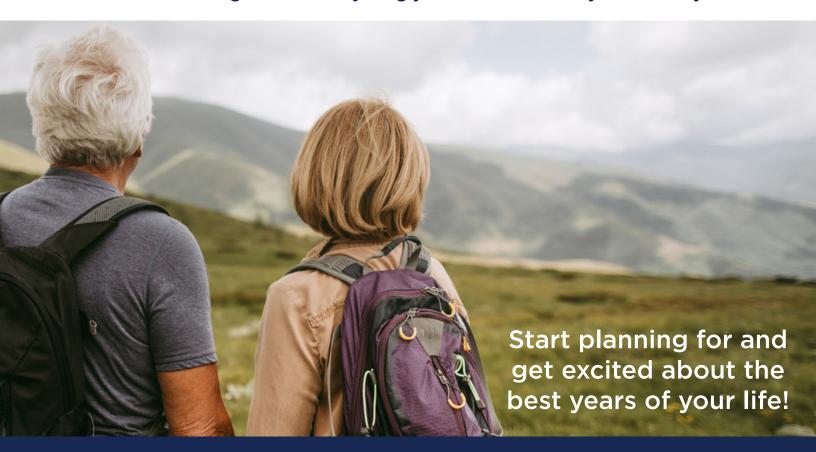
WITH MARK & JODY ROLLINS

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.



retirementtransformed.com

Retirement Transformed Toolkit One Year Out Retirement Checklist

Your Career Closeout Checklist

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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 collegues 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:		

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Personal Checklist

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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:		

Retirement Transformed Toolkit One Year Out Retirement Checklist First Week at Home Checklist

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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:		