FolarraStudio

Retirement Planner

dream · plan · enjoy

UNDATED · PRINTABLE · BUDGET, PLANS & BUCKET LIST

This Planner Belongs To

for the next great chapter

NAME _____

PLANNED RETIREMENT DATE _____

STARTED ON _____

WHERE I WANT TO LIVE _____

MY DREAM FOR RETIREMENT _____

How to use this planner

- Print the whole planner once, then print extra copies of the pages you use most, such as the Retirement Budget and Bucket List pages.
- Print at 100% / Actual size on A4 or US Letter paper. The printable pages have a white background to save ink.
- Hole-punch the pages and keep them in a binder, so you can add pages any time.
- Every page is undated, so you can start in any month of any year.
- Start with the Vision page, then fill in the budget and checklist pages at your own pace.
- Digital planner: open the hyperlinked PDF in any PDF annotation app and tap the tabs to jump between sections.

My word for this chapter

What I look forward to most

Contents

tap a title in the digital planner to jump to it

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Retirement Vision

what the next chapter looks like

Where I want to live

How I want to spend my days

Who I want to spend time with

What I want to learn

Retirement Timeline

key dates and decisions

DATE / AGE	MILESTONE	TO DO	DONE
			☐
			☐
			☐
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Income Sources

where the money will come from

SOURCE	STARTS	MONTHLY	YEARLY	NOTES

Retirement Budget

monthly costs, then and now

CATEGORY	NOW	IN RETIREMENT	NOTES
Home			
Utilities			
Food			
Transport			
Health			
Insurance			
Travel			
Hobbies			
Gifts			
Family			
Savings			
Other			
Total			

Savings Tracker

color in a circle every time you save

SAVING FOR _____ GOAL _____ BY _____

1	2	3	4	5	6	7	8	9	10
11	12	13	14	15	16	17	18	19	20
21	22	23	24	25	26	27	28	29	30
31	32	33	34	35	36	37	38	39	40
41	42	43	44	45	46	47	48	49	50
51	52	53	54	55	56	57	58	59	60
61	62	63	64	65	66	67	68	69	70
71	72	73	74	75	76	77	78	79	80
81	82	83	84	85	86	87	88	89	90
91	92	93	94	95	96	97	98	99	100

EACH CIRCLE = _____

DATE	ADDED	TOTAL

SAVING FOR _____ GOAL _____ BY _____

1	2	3	4	5	6	7	8	9	10
11	12	13	14	15	16	17	18	19	20
21	22	23	24	25	26	27	28	29	30
31	32	33	34	35	36	37	38	39	40
41	42	43	44	45	46	47	48	49	50
51	52	53	54	55	56	57	58	59	60
61	62	63	64	65	66	67	68	69	70
71	72	73	74	75	76	77	78	79	80
81	82	83	84	85	86	87	88	89	90
91	92	93	94	95	96	97	98	99	100

EACH CIRCLE = _____

DATE	ADDED	TOTAL

Before I Retire

a calm, prepared transition

Money

- [ ] Review savings
- [ ] Check pension dates
- [ ] Clear debts
- [ ] Make a budget
- [ ] Talk to an advisor
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____

Health

- [ ] Health check-up
- [ ] Review insurance
- [ ] Plan for care
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____

Life

- [ ] Plan first months
- [ ] New routines
- [ ] Clubs & classes
- [ ] Volunteer ideas
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____

Home

- [ ] Decide where to live
- [ ] Declutter
- [ ] Repairs & updates
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____

Retirement Bucket List

finally, time for it all

DONE	DREAM	COST	WHEN
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My Ideal Week

design your days

DAY	MORNING	AFTERNOON	EVENING
Monday			
Tuesday			
Wednesday			
Thursday			
Friday			
Saturday			
Sunday			

Important Contacts

advisors, pensions & insurers

NAME
COMPANY
ROLE
PHONE
EMAIL
NOTES

NAME
COMPANY
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EMAIL
NOTES

NAME
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Wishes & Legacy

what I want to pass on

Values to share

Stories to tell

Wishes

Where my papers are kept

Notes



FolarraStudio

Thank you!

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