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Approaching retirement planning checklist



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RETIREMENT PLANNING

retirement checklist

Financial — 5 years out

Pension forecast checked at gov.uk: ☐
All old pension pots traced and consolidated: ☐
State pension forecast checked: ☐ NI years:
____/35
Financial adviser consulted (drawdown vs
annuity): ☐

Practical

Health insurance reviewed (employer-provided
ending): ☐
Will updated: ☐ Power of Attorney arranged: ☐
State Pension claim submitted (4 months
before): ☐
National Insurance record final check: ☐

Financial — 1 year out

Tax-free lump sum decision made: ☐
Pension access method decided: drawdown ☐
annuity ☐
Income from all sources calculated: £____/year
Mortgage / debt fully cleared by retirement: ☐

Lifestyle planning

Daily structure considered — what will fill the
time: ☐
Social connections beyond work identified: ☐
Health and fitness plan in place: ☐
Bucket list items prioritised: ☐