



Petal & Paper

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Retirement readiness planner



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R E T I R E M E N T P L A N N I N G

readiness checklist

Target retirement age · ____ Years to go: ____

State pension · Forecast checked (gov.uk): ☐ Amount: £____ Age: ____

Workplace / private pensions · Total pot: £____ Providers traced: ☐

Income needed in retirement · £____ /year (rule of thumb: ~2/3 of working income)

Other income / savings · ISAs: £____ Investments: £____
Property: ____

Lifestyle plans · Travel: ____ Hobbies: ____ Where to live: ____

To do · Pension advice: ☐ Will updated: ☐ Debts cleared: ☐

T H E E A R L I E R Y O U P L A N , T H E M O R E
C H O I C E S Y O U H A V E — S T A R T N O W

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