

Retirement Decision Map

One decision. One connected map. One next step.

HOUSEHOLD _____

DATE _____

1 Start with the question

WHAT DECISION IS IN FRONT OF US?

WHAT SHOULD THIS CHOICE MAKE POSSIBLE?

DATE OR EVENT ALREADY SHAPING IT

2 See what connects

WHAT DO WE KNOW TODAY?

WHAT STILL NEEDS TO BE CHECKED?

WHAT CHANGES IF THIS DECISION MOVES?

G Daily bread

R Margin

A Portfolio job

C Tax timing

E People + purpose

3 Put it in order

WHAT MUST HOLD FIRST?

WHAT DOES THIS CHOICE GIVE US?

WHAT DOES THIS CHOICE ASK FROM US?

4 Write the plan

CURRENT DIRECTION - AND WHY

NEXT ACTION

OWNER

BY WHEN

REVIEW THIS DECISION WHEN