



# Retirement Lifestyle Worksheet

Are you looking forward to retirement? When you picture it, what does your lifestyle look like? Many people view retirement as an opportunity to spend time with family, help others, or learn new skills. Others travel, explore, or focus on their health to enjoy what may be many years in retirement.

This worksheet can help you and your financial professional define expectations, manage priorities, and plan for the retirement you want. Please check all the boxes that apply, and use the spaces provided to write in additional information you want to share. After you complete the worksheet, bring it to your next appointment to review with your financial professional.

Please do not send this worksheet to Pacific Life as we cannot and do not provide financial, legal, or tax advice.

## Home

Where do you plan to live when you retire?

- Home I own
- Sell my home and downsize
- Rent a house or apartment
- Retirement community
- With family or friends
- Other

Additional Information

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## Transportation

What types of transportation will you use?

- Car I own
- Lease a car
- I plan to replace my car every \_\_\_\_\_ years
- Public transportation
- Both public and private transportation
- Other

Additional Information

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Insurance products are issued by Pacific Life Insurance Company in all states except New York and in New York by Pacific Life & Annuity Company. Product availability and features may vary by state.

**No bank guarantee • Not a deposit • May lose value  
Not FDIC/NCUA insured • Not insured by any federal government agency**

**Food**

Additional Information

**How will your dining habits change?**

- Prepare more meals at home
- Dine out and entertain more
- Subscribe to a meal home delivery service
- Dine out and entertain less

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**Clothing and  
Personal Care**

Additional Information

**How will your purchases change when you stop working?**

- Little to no change
- Expenses will increase
- Expenses will decrease

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**Medical**

Additional Information

**How do you plan to pay for your medical, dental, and alternative therapy expenses?**

Purchase insurance:

- Medical
- Dental
- Vision
- Medicare
- Long-term care
- Pay out-of-pocket for some expenses
- Pay out-of-pocket for all expenses

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**Wellness**

Additional Information

**Will your health and wellness activities change?**

- Exercise more frequently
- Join a health or country club
- Purchase exercise equipment
- Cancel a club membership

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### Travel

Will your travel frequency change in retirement?

- Travel more
- Travel about the same
- Travel less

Additional Information

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### Recreation

Will you spend more money on leisure activities such as wine tasting, attending the theater, or spoiling the grandchildren?

- Spend more
- Spend about the same
- Continue or try new hobbies

Additional Information

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### Philanthropy

Will you use your time and resources to support your community?

- Plan to volunteer in my community
- Help people in need with financial support
- Interested in planning for charitable giving
- Interested in socially responsible investing

Additional Information

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### Financial Legacy

How would you like to transfer your wealth?

Leave a financial legacy:

- Loved ones
- Charitable organizations
- Reduce estate taxes
- Set up a trust
- Not interested in discussing a plan at this time

Additional Information

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Take advantage of Pacific Life's retirement resources at [PacificLife.com](https://www.pacificlife.com), or ask your financial professional for more information.

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