

## Appendix 3

### Questions for Couples to Work on Separately and Then Come Together to Discuss Individual Responses and Then Complete a Combined Approach to Retirement

When would you like to retire? Do we retire at the same time? If not what would the time length be between each retirement date?

What would the perfect retirement life be like? (Your idea of an ideal retirement may be coffee and a newspaper in the morning, golf in the afternoon, cocktails at five, and a good book at the end of the day. Or it might be wanting to be constantly on the move, traveling, and trying news. This is just for you to understand each other's perspectives and identify where your goals may merge.)

Who will be responsible for what in retirement? (From deciding household chores to paying bills – this may be prove to be opportunity to change-up existing responsibilities, and or to discuss what responsibility you don't mind continuing carrying out – remaining flexible to address new things to be completed as they arise.)

What common interests do you share? (Even though you may assume that common interests are apparent – the busyness of lives pre-retirement – imposed structures – may not have provided an opportunity for discussions.)

What separate interest do you have? (This provides space to pursue separate hobbies and contributes to a healthy relationship.)

What are your individual goals for retirement? (It is helpful to use attached table (Wants and Needs) to list as goals arise in your thoughts, and then revisit together at different times throughout the first year of retirement (honeymoon phase) to see if goals have changed.)

Will you stay in your current home or relocate or downsize?

Here are sample questions that you may also wish to discuss with your partner to help ease into this new phase of your life:

- Will you go to bed and wake up at the same time?
- Will you eat breakfast, lunch, and dinner together every day?
- How much alone time will each of you need?
- How much time do you plan to spend with family, friends, or volunteering?
- What's one thing you plan to pursue on your own, and one thing you want to do together, in your first year of retirement?

# RETIREMENT SEMINARS

