



OPTIONAL PRE-WORK

Retirement Strategies: Creating Your Plan

1. Social Security

✓ **Most important pre-work:** Obtain a copy of your *Social Security Statement* to bring with you to the seminar.

- Go to www.ssa.gov
- *Sign In or Create an Account*
- Once you are signed in, agree to the *Terms of Service*
- Click on *Print/Save Your Full Statement*

If applicable, you may also want to do this same process with your spouse.

2. Health Insurance

- ✓ Find out what you pay monthly for health insurance
- ✓ Find out from your YMCA, or spouse's employer if you are on a spouse's coverage, what the full premium is for your current coverage (your monthly cost + the employer's monthly cost)
- ✓ Find out if the employer allows you to stay on their health insurance coverage as a Retiree

3. Leisure Activity Checklist

- ✓ On the accompanying handout, check any activities that you plan to do in retirement and/or add your own to the list

4. Your Seminar Goals

Give some thought to what you hope to gain by attending the seminar. Be prepared to share your goals with the group.

We look forward to seeing you at the seminar!



CHECKLIST FOR Leisure Activities in Retirement

- | | | |
|---|--|--|
| <input type="checkbox"/> Acting | <input type="checkbox"/> Fishing | <input type="checkbox"/> Reading |
| <input type="checkbox"/> Bird watching | <input type="checkbox"/> Gardening | <input type="checkbox"/> Refereeing |
| <input type="checkbox"/> Boating | <input type="checkbox"/> Genealogy | <input type="checkbox"/> Religion |
| <input type="checkbox"/> Bowling | <input type="checkbox"/> Golfing | <input type="checkbox"/> Repairing/Renovating |
| <input type="checkbox"/> Camping | <input type="checkbox"/> Hiking | <input type="checkbox"/> Scrap Booking |
| <input type="checkbox"/> Club/Society | <input type="checkbox"/> Investing | <input type="checkbox"/> Sewing |
| <input type="checkbox"/> Coaching | <input type="checkbox"/> Jogging/Running | <input type="checkbox"/> Sporting Events |
| <input type="checkbox"/> Collecting | <input type="checkbox"/> Kayaking | <input type="checkbox"/> Swimming |
| <input type="checkbox"/> Continuing Education | <input type="checkbox"/> Knitting | <input type="checkbox"/> Teaching/Mentoring |
| <input type="checkbox"/> Cooking | <input type="checkbox"/> Movies | <input type="checkbox"/> Traveling/Vacations/Cruises |
| <input type="checkbox"/> Crafts | <input type="checkbox"/> Museums/Art Galleries | <input type="checkbox"/> Volunteering |
| <input type="checkbox"/> Cycling | <input type="checkbox"/> Music | <input type="checkbox"/> Walking |
| <input type="checkbox"/> Dancing | <input type="checkbox"/> Painting | <input type="checkbox"/> Woodworking |
| <input type="checkbox"/> Entertaining | <input type="checkbox"/> Part-time Work | <input type="checkbox"/> Writing |
| <input type="checkbox"/> Exercising | <input type="checkbox"/> Photography | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Family Activities | <input type="checkbox"/> Politics | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Family Outings | <input type="checkbox"/> Quilting | |