

CATEGORY 15

Retirement & Future Planning

Couples Discussion Guide

INSTRUCTIONS

Complete your side independently first. Be honest — not diplomatic. Then share with your partner and discuss. The goal is understanding, not agreement.

QUESTION REFLECTION

For each question, write your honest answer in 1–3 sentences.

1. What will retirement look like for you?

Him:

Her:

2. Where do you want to live and what will you do?

Him:

Her:

3. Will your partner want the same thing?

Him:

Her:

4. How should we prepare financially for retirement?

Him:

Her:

5. What role should our children play in our later years?

Him:

Her:

6. How do you want to handle aging and health challenges?

Him:

Her:

7. What dreams do you want to pursue in retirement?

Him:

Her:

8. Should we retire at the same time or separately?

Him:

Her:

9. What does leaving a legacy mean to you?

Him:

Her:

10. How should we handle end-of-life decisions and planning?

Him:

Her:

11. What kind of lifestyle do you envision in retirement?

Him:

Her:

12. How important is staying near family versus pursuing other goals?

Him:

Her:

13. What activities or service opportunities interest you for later life?

Him:

Her:

14. How should we handle healthcare decisions as we age?

Him:

Her:

15. What fears do you have about growing old together?

Him:

Her:

AFTER THE DISCUSSION — Complete Together

The answer that surprised me most from my partner was:

One expectation I now understand about my partner that I didn't before:

One thing I am committing to do differently based on this conversation:

ALIGNMENT RATING

Circle one for each:

How aligned are we on retirement and future goals?

1 — 2 — 3 — 4 — 5 — 6 — 7 — 8 — 9 — 10

How satisfied am I with our long-term planning?

1 — 2 — 3 — 4 — 5 — 6 — 7 — 8 — 9 — 10

OUR AGREEMENT

Write one shared commitment based on what you discovered in this category:

"In the area of Retirement and Future Planning, we agree to:

"

Signed: _____ **&** _____

Date: _____