



Defining My Ideal Retirement

Names :

Date:

Knowing your destination is half the journey.

But, the challenge is many expats don't have a clear idea of what their ideal retirement is? Spend just 10 - 15 minutes with your spouse/partner to visualise your dream retirement

Self Analysis

1. I / We want to retire or be financially independent at age:
2. Where can we retire and/or where do we want to retire?

Please mention the list of probable countries and cities

3. What facilities do we want in the City/town?

Take into consideration: Proximity to children and other family, Access to quality healthcare, Airport, Parks and other infrastructure.

4. What kind of house would we want to live in?

Apartment / Villa / Townhouse / Rented / Own / Private or in a Community. One House or houses in 2 or more countries

5. What kind of amenities we want in our house?

6. What kind of activities we want to engage during retirement?
Eg: Golf, Cricket, Yoga, Spirituality etc...



7. Will we need Domestic help?

Yes / No

8. Important benefits

1. Health Insurance
2. Gym / club Membership
3. Annual Travel / Vacation / Visiting family
4. others...

8. Other important considerations not listed above

10. What other goals I want to achieve before retirement?(List only the Top 5)

Sl No	Goal	Due Year

My/Our Definition of an Ideal Retirement is
