

UNDATED PLANNER

My Retirement Compass

Clarity begins with the next honest question.

DEVICE

CALENDAR

WEEK START

iPad 11-inch / Goodnotes

Undated

Monday

YEAR AT A GLANCE

01 January	02 February	03 March	04 April
05 May	06 June	07 July	08 August
09 September	10 October	11 November	12 December

INCLUDED

12 months - 52 weeks - Goals - Habits - Notes

Layout - agenda week - intentions month

WEEK INDEX	THIS WEEK	THIS MONTH	PREPARE
------------	-----------	------------	---------

MONTH 1

Retirement Month

W	MON	TUE	WED	THU	FRI	SAT	SUN
01	W1						
02	W2						
03	W3						
04	W4						
05	W5						

WEEKS

W1

W2

W3

W4

W5

PLANNING QUESTION / DECISION

STATEMENTS / DEADLINES / CONVERSATIONS

WEEK 1

Retirement Week

Move one retirement-planning question toward reliable information, documented choices, and appropriate professional review.

QUESTION TO ANSWER	SOURCE TO VERIFY	DECISION OWNER

MON

GATHER / VERIFY / DISCUSS / DECIDE

1

TUE

GATHER / VERIFY / DISCUSS / DECIDE

2

WED

GATHER / VERIFY / DISCUSS / DECIDE

3

THU

GATHER / VERIFY / DISCUSS / DECIDE

4

FRI

GATHER / VERIFY / DISCUSS / DECIDE

5

SAT

GATHER / VERIFY / DISCUSS / DECIDE

6

SUN

GATHER / VERIFY / DISCUSS / DECIDE

7

DOCUMENTS TO LOCATE

NUMBERS TO UPDATE

PEOPLE TO CONSULT

NEXT REVIEW

M1

IDX

next week >

QUIET BLOOM PRESS

15

PREPARE

Retirement Picture

Describe the life, responsibilities, priorities, and uncertainties the plan needs to support.

HOW I HOPE LIFE FEELS	PEOPLE / RESPONSIBILITIES
HOME / LOCATION	WORK / CONTRIBUTION
CARE / ACCESS NEEDS	QUESTIONS STILL OPEN

REVIEW

Contribution Record

Record contributions and source statements for later reconciliation, not investment-performance advice.

DATE	ACCOUNT	EMPLOYEE / PERSONAL	EMPLOYER / OTHER	STATEMENT