

Lifestyle Action Plan

Use the worksheet to establish and prioritize health, relationships, activities and accommodation action items and timelines. Reflect upon the essential and optional considerations.

Before using this form:

1. Download and save a copy to your computer or cloud storage.
2. Close the online version and open the copy you saved.
3. Enter your information and save the form.
4. Save again after making changes.

Action Plan: Health

ESSENTIAL			
	Item	Action	Date to be Completed
	E.g., Research health plans	Check on internet and with employer	90 days before retirement
	1.		
	2.		
	3.		
	4.		

OPTIONAL			
	Item	Action	Date to be Completed
	1.		
	2.		
	3.		
	4.		

Action Plan: Relationships

ESSENTIAL			
	Item	Action	Date to be Completed
	E.g., Set boundaries with family members on use of my time	Discuss issue privately with each person	Over the next 3 months
	1.		
	2.		
	3.		
	4.		

OPTIONAL			
	Item	Action	Date to be Completed
	1.		
	2.		
	3.		
	4.		

Action Plan: Activities

ESSENTIAL			
	Item	Action	Date to be Completed
	E.g., Find an enjoyable indoor activity to do in the winter	Research community programs; pick one activity to try	Sign up when next offered
	1.		
	2.		
	3.		
	4.		

OPTIONAL			
	Item	Action	Date to be Completed
	1.		
	2.		
	3.		
	4.		

Action Plan: Accommodation

ESSENTIAL			
	Item	Action	Date to be Completed
	E.g., Check out the medical resources available in the location in which I am considering retiring	Online search and ask friends	Prior to next time I visit in-person
	1.		
	2.		
	3.		
	4.		

OPTIONAL			
	Item	Action	Date to be Completed
	1.		
	2.		
	3.		
	4.		