

ACTIVITY 2 Retirement assets and resources checklist



Review and rate yourself on how satisfied you are with each of the following assets/resources

YOUR TANGIBLE ASSETS

DO I (OR WILL I) HAVE



YES



NO / NOT YET



NOT SURE

Enough savings, superannuation and pension entitlements to live on?

☐

A satisfactory house, unit (plus furniture and appliances) and/or place to call home?

☐

Access to private (e.g. car) and/or public transport?

☐

Necessary private/public health insurance cover/facilities?

☐

YOUR INTANGIBLE ASSETS

I.E. HAVING

A sense of some degree of control or 'mastery' over your life and being able to creatively problem solve and turn threats into opportunities

☐

An opportunity to determine when and how I leave work including the option of tapering down and working part-time

☐

A sense of identity beyond work (e.g. having a range of non-work roles, activities and interests like being a grandparent, friend, volunteer, golfer, bridge player, gardener etc)

☐

Strong and diverse social supports (including family, friends, neighbours and members of special interest groups and sporting clubs)

☐

Enough resilience to bounce back from setbacks and manage stressful situations especially around health and family issues

☐

A reasonable level of personal health and fitness

☐

A range of purposeful activities to provide a sense of meaning and being useful

☐

Enough things to look forward to

☐


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NOTES
