

Retirement & Relationships: Couples Conversation Worksheet

You can use this in one sitting or over several conversations. Each partner answers individually first, then you share.

1. How Do I Define Retirement?

My view of retirement:

- What does "retirement" mean to me (full stop, part-time, encore work, volunteering, etc.)?

- _____

- _____

- Ideally, when and how would I like to retire?

- _____

2. My and Our Daily Life in Retirement

Individually, imagine a "good" typical week in retirement.

My ideal week looks like:

- How I spend mornings: _____
- How I spend afternoons: _____
- How I spend evenings: _____
- Time with partner/family/friends: _____
- Work/volunteering/hobbies: _____

Together – What elements do we want to design into our shared life?

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3. My Transition Style

Think about a past major change (job change, move, loss, etc.).

- I usually struggle most with (circle one):
 - Endings / The messy middle / New beginnings
- An example of how I reacted in the past:

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- What I most need from you during transitions:

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Together – How can we support each other better in this retirement transition?

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4. Health, “What-Ifs” & Quality of Life

- When I think about my health as I age, my biggest concerns are:

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- “Quality of life” means:

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- One thing I’d like us to plan for (location, care, lifestyle):

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Together – Actions we could take in the next 6–12 months:

- 1.

- 2.

5. Purpose, Contribution, and Giving Back

- Things that give me a sense of **purpose** now:

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- Ways I’d like to **give back** in retirement:

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Together – Possible shared projects or contributions:

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6. Our Strengths as a Couple

Strengths I see in you that help us in this stage:

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Together – How we want to lean on these strengths in retirement:

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7. The 24–48 Hour Question

Answer individually, then share.

If I found out I had 24–48 hours to live, I would regret not having done or said...

- Done: _____
- Said (especially to you): _____

Together – What do we want to change now based on these answers?

1.

2.

Use this worksheet as a **living document**—revisit it yearly or after major life changes.