



Your Financial Tool Kit

Developed by the Financial Consumer Agency of Canada, the Investor Education Fund and l'Autorité des marchés financiers



My retirement preparation checklist

Use this checklist to get your financial house in order before you retire.

	I'm OK	Needs work
Pay off your debts as soon as you can.	<input type="radio"/>	<input type="radio"/>
If there are costly items you need, such as a car or a new roof for your home, buy them while you are still working.	<input type="radio"/>	<input type="radio"/>
If you have medical and dental insurance where you work, have any treatments or work done while you're still covered. Determine to what degree you can carry forward work benefits into retirement and what those costs may be, if any.	<input type="radio"/>	<input type="radio"/>
Check your finances. If you're not sure whether you'll have enough income, you may want to work a little longer to give yourself more time to save.	<input type="radio"/>	<input type="radio"/>
Start planning how you'll get income from your savings after you retire. If you need help, contact a financial professional.	<input type="radio"/>	<input type="radio"/>
Make a plan for what you'll do with your time after you retire. Be sure you have enough income to cover the costs of your lifestyle	<input type="radio"/>	<input type="radio"/>