



# retirement plan **advisors**

## **10 Conversations We Wish Couples Would Have Before They Come to See Us**

- We have discussed the timing of our retirement.
- We have discussed how we make financial decisions.
- We have discussed transition and how our roles may change.
- We have discussed how we spend time together and time apart.
- We have discussed our obligations and responsibilities.
- We have discussed future healthcare needs.
- We have discussed our future lifestyle and location.
- We have discussed our community and social connections.
- We have discussed our values—what’s important to us.
- We have discussed what we don’t understand about our circumstances.