

PREPP Checklist

Physician Retirement Emotional Preparedness Program

Doctor, are you PREPP-ed for retirement?

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This checklist is intended to assist you in assessing and preparing for your unique retirement journey as a physician.

1. I would describe my financial readiness for retirement as



2. I would describe my overall health readiness-including mind, body, and spirit-for retirement as



3. I would describe my emotional readiness to retirement as



4. My financial plan and emotional preparation plan are aligned for my retirement.

| Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree |
|-------------------|----------|---------|-------|----------------|
| 1 | 2 | 3 | 4 | 5 |

5. I have identified my retirement haven, and when applicable, my significant other and I have agreed on our shared retirement haven.

| Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree |
|-------------------|----------|---------|-------|----------------|
| 1 | 2 | 3 | 4 | 5 |

6. I am planning to explore passions that I never had time to pursue before retirement.

| Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree |
|-------------------|----------|---------|-------|----------------|
| 1 | 2 | 3 | 4 | 5 |

7. I have identified my “Third Act Plan” (i.e., reflection, self-discovery, and reinvention in retirement to pursue passions and interests) and when applicable, my significant other and I have reached a consensus on our individual “Third Act Plans.”

| Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree |
|-------------------|----------|---------|-------|----------------|
| 1 | 2 | 3 | 4 | 5 |

8. When applicable, my significant other and I have agreed upon a "Third Act Plan as a Couple."

| Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree |
|-------------------|----------|---------|-------|----------------|
| 1 | 2 | 3 | 4 | 5 |

9. I have identified my travel preferences, and when applicable, my significant other and I have agreed on our travel plans, including timing, destinations, mode of travel, and budget.

| Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree |
|-------------------|----------|---------|-------|----------------|
| 1 | 2 | 3 | 4 | 5 |

10. I have considered future contingencies, and when applicable, my significant other and I have agreed to adjust our individual and joint 'Third Act Plans' and travel plans in case of significant health events.

| Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree |
|-------------------|----------|---------|-------|----------------|
| 1 | 2 | 3 | 4 | 5 |