

The Couples Retirement Puzzle:

10 Must-Have Conversations for Transitioning to the Second Half of Life
By Roberta Taylor, RNCS, M.Ed. and Dorian Mintzer, M.S.W., Ph.D

Mini Assessment

Are you and your partner on the same page when it comes to retirement or are you reading different books? This simple assessment will help you get a quick glimpse into how each of you views your communication.

Instructions: Do the assessment separately and then share your results.

Put a **T** after the statements you believe are **true**. Notice the areas that you may want to talk more about.

- We have talked about our timetable for retirement
- We make financial decisions together
- We know that our roles may change as we go through transition
- Having time together and time apart is important to both of us
- Intimacy and affection are an important part of our relationship
- We agree on our obligations and responsibilities to family
- We have planned for future medical and health care needs
- We talk about lifestyle and where we may want to live
- Social and community connections are a satisfying part of our lives
- We have shared values and know what's important to each other

Where do you fall on the scale below? How many T's do you have in common? Remember, this is meant to be a helpful tool for opening up communication. No blaming or shaming allowed!

Scoring

10-11	Give each other a big hug. You're ready to write the "How To" book for couples.
6-9	Sounds like you're in synch. Ongoing communication is important as you plan for what's next.
5-8	You're on the right track. Practice listening to each other and sharing what's important to you.
1-4	You're not alone. Many couples need help being able to talk about important issues related to retirement and what's next.