

My Life Bucket List

Special Report

When you're young, you have time and health... but no money.

When you're middle-aged, you have money and health... but no time.

When you are ready to retire, you want all three!



Here to help!
877-220-1089



Introduction:

Let *us* help you make the most of your money, plan your time wisely, and fully enjoy the rewards of good health.

Life is too short!

If you haven't done so already, grab your bucket.

Your bucket is empty, you say?

It's time to start working on your list.

What list?

Your collection of goals, dreams, and wishes you want to accomplish during retirement... safely stored in your proverbial life bucket.

Let's help you fill it ...

and then encourage you to start emptying it!

How many times have you said, "Time flies...", "Someday...", or "I wanna..."? What were you thinking as you started those phrases?

Let's list what you want to do with your retirement time and create a plan to make it a reality.

We know many people can get stuck on how to start making lists. Here are a few interest categories and suggestions to get your juices flowing.



Interest Categories:

- **Travel:** Would you like to visit all the baseball parks in the nation, all 50 states, take a cruise, or visit the Great Barrier Reef or the Pyramids in Egypt?
- **Relationships** -Who do you want to share your bucket life with? Are there any long-lost relatives or friends you want to reunite with?
- **Career** - You may want to get a patent or write a book.
- **Financial-** Do you want to plan a legacy donation to your alma mater or create a scholarship fund?
- **Entertainment** - Get once-in-a-lifetime tickets to an entertainment or sporting event in the US or overseas.
- **Adventure:** Should you take a hike like the Tour de Mont Blanc or the Camino de Santiago or go on an African Safari or stay stateside and explore trails in the 50 states?
- **Creativity** - Maybe you want to learn a craft in a foreign country or a medieval skill like jousting.
- **Education** - Do you want to learn a new language or volunteer as a subject matter expert at a college or university?
- **Hobby** - Perhaps you'd like to become a farmer or gardener, take your painting hobby to masterclass level, or cook with a European chef.
- **Volunteer** - You can use your extra time at a pet rescue, a hospital, or a place of worship.



Still need help with list ideas?

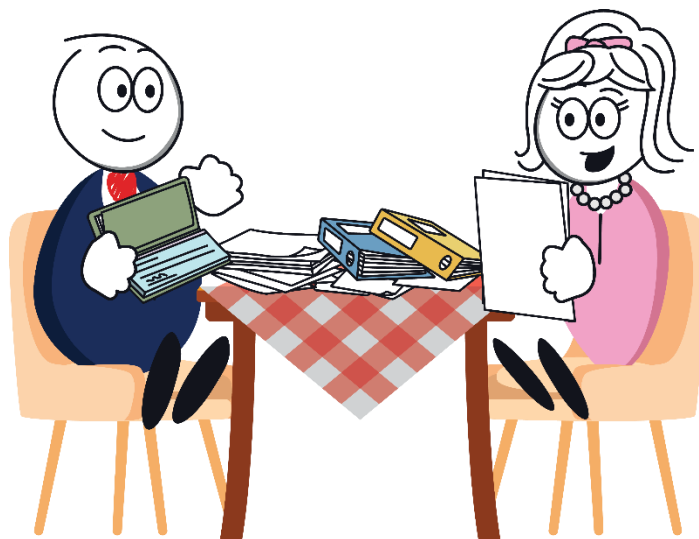
Well, what would you still like to accomplish? Your bucket list is going to be unique to you. It might even look different than your spouse's. Together, your ideas could snowball into other ideas. You could share suggestions with family and friends to make your brainstorming session meatier. As you begin, consider the following questions:

What do I want to accomplish?

- Do I want to move closer to family?
- Any new foods I want to try or learn to prepare?
- Any dreams I had as a child?
- What sports or outdoor activities would you like to try?
- Are there any events I want to attend?
- Are there any classes I have always thought about taking to learn a new skill?
- What would I do if money, time, or fear were no object?
- Ways I have wanted to give back in time or money?
- Someone I have always wanted to meet?
- What do I enjoy and want to do more of in my 'own backyard'?
- Expand my music talents with lessons or perform with other artists?

Emptying Your Bucket!

Once you have a list, it's time to plan the steps to begin emptying your bucket. Creating action items and goals will motivate you to start tackling your list and keep you focused on reaching your goals.



Let's start by prioritizing the interests you included. That will help you evaluate your likelihood of starting and completing your list.

Consider asking yourself these prioritizing questions to organize your list. :

- How much will completing this goal cost me (in time, money, etc.)?
- Do I need help from someone?
- How meaningful is this goal for me to accomplish it?
- Are there obstacles or challenges I need to remove before I proceed?
- Is there a time element I need to meet?
- Can I secure the necessary supplies for my goal?
- Can I make mini milestones to achieve each goal?
- Who will accomplish it with me?

Create deadlines to start checking things off.

The best way to tackle an elephant is one bite at a time. So here are some tips for organizing your list in smaller bites to reach the goal of accomplishment.

- Implement a **specific timeline** for certain goals during specific months of the year.
 - A **seasonal bucket list** is super helpful. Some goals can only be achieved during certain seasons. You don't want to take an African Safari in the heat of summer!
 - **"This year's" bucket list.** Choose a few goals to accomplish this year. It will be fun to see how it goes!
 - **The "next 12 months" bucket list,** and so on...
 - Designate a **Bucket List Weekend** per month or for smaller lists designate a **Random Bucket List day.**

- **Combine Similar categories to check off items while doing other things**
 - **Location/Destination:** You could combine cooking in Europe with a lifelong desire to take a river cruise.
 - **Reunion:** Meet with family for a holiday, explore a famous location, or try a new food.
 - **History and Sports** Hike with friends to an abandoned railroad tunnel or mining town.

“Achieve it” Activity

- Let's practice completing one activity. Start Simple.
- What steps will you take to cross it off the list?
- Pick one activity you want to achieve first.

(Here is a sample activity to inspire you.)

Nostalgic Route 66 Road Trip

**Research where, when, how, and with whom this activity will take place
(use a travel agent if necessary to simplify reaching your goal.)**

You can experience the route by car, bus, motorcycle, or RV. Consider renting a classic car for your classic adventure! Firstly, decide where you will start your route (Santa Monica or Chicago) and then how you will get there.

Choose your dates of travel.

Most people take two weeks to complete the route. Be sure to build in days for exploring and not just traveling! Pick the points of interest you want to be sure to stop at. If you have family along the route, add more time to the trip so you can visit. *(Research online indicated that May to October is the best time to travel)*

Research costs: Hotels, meals, gas, potential tolls, and the best time to do the route.

How you will do the route will impact your costs. Will you get to the starting point by air and rent a vehicle? Will you drive to the starting point with your own vehicle? Do you need to rent an RV or a classic car? Advance reservations would be at the top of your list. Do you need RV site reservations? When does your rental need to be returned, or is it a one-way rental?

The full route is 2,448 miles of road. You can break your trip up based on how many miles you want to enjoyably cover daily. Book your hotels ahead of time if you know where you will stop, or 'rough it' by finding lodging based on whatever mileage you cover that day. Sometimes, just 'throwing a dart' adds to the fun of the adventure.

Websites can help you plan your lodging and select points of interest. Be sure to print a map to take with you in case you are in an area with low phone/internet reception for map guidance.

Other considerations...

Depending on your retirement income plan, will the expense for this “Bucket List” item impact any other items you plan to tackle in the same year?

Do you have the appropriate clothing for your adventure? Shopping is also a bucket list item unto itself!

Make arrangements for things back home, such as pet sitting, plant watering, home sitting, bill paying, and canceling medical appointments.

Get a calendar and start crossing off the days until your departure. Then, get packing and hit the road (or air).

Enjoy everything about your trip!

Check the item(s) off your list

Start planning your next item on the list!

Feel free to add, delete, or change any item on your list. During your retirement years, you will be filling and emptying your bucket!

Consider creating smaller sub-lists to tackle more regularly:

✓ **List philanthropic things to do:**

(Donate to college/grandson \$50k, scholarship fund.)

✓ **List foods to try:**

(Luther Burgers from Georgia, Alaskan ice cream, Fried Coke from Texas, Conch fritters in Florida.)



✓ **List hometown things to do**

(Volunteer at the local library, share your knowledge at a historical center, or help at a local pet shelter.)

✓ **List local landmarks to visit**

(The Statue of Liberty, Fisherman's Wharf, Key West, Arches National Park.)

✓ **List things you dreamed of doing as a kid...**

(Participate in the local theater performance, drive a bulldozer or a race car.)

✓ **List local history and adventures**

(Explore a mine, kayak a river, go wine tasting, visit a farm.)

We hope this guide will inspire you to stop procrastinating and enjoy everything you have worked so hard for. Start today!

For help with your Retirement and Healthcare Planning needs contact us:

**American Retirement Advisors
Direct line: 602-281-3898
judi@AmericanRetire.com**

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