AFFORDABLE RETIREMENT ABROAD

Retirement Timeline Planner

Planning your retirement abroad requires careful timing and preparation. This timeline provides a personalized roadmap for your international retirement journey.

3-5 Years Before Retirement

Phase 1

January 2022 - January 2024

- Research potential retirement destinations
- Assess your retirement savings and income sources
- Learn about visa requirements for different countries
- Begin learning the language of potential destinations
- Research healthcare options abroad
- Create a retirement budget
- Consider tax implications of living abroad

2-3 Years Before Retirement

Phase 2

January 2024 - January 2025

- Visit potential retirement destinations

- Join expat forums and connect with retirees abroad
- Research property options (rent vs. buy)
- Review and update your will and estate plan
- Research banking options for expats
- Create a plan for your existing property
- Evaluate international health insurance options

1-2 Years Before Retirement

Phase 3

January 2025 - January 2026

- Begin visa application process
- Set up international banking
- Research tax filing requirements as an expat
- Make longer visits to your chosen destination
- Research shipping options for personal belongings
- Create a communication plan with family and friends
- Research Medicare options (if applicable)

6-12 Months Before Retirement

Phase 4

January 2026 - July 2026

- Secure long-term housing in your new country
- Purchase international health insurance
- Begin downsizing and selling possessions
- Notify Social Security of your plans (if applicable)
- Arrange for mail forwarding
- Research phone and internet options abroad
- Schedule necessary medical check-ups

3-6 Months Before Retirement

Phase 5

July 2026 - October 2026

- Finalize visa arrangements
- Book one-way flights
- Arrange for shipping of belongings
- Notify financial institutions of your move
- Set up automatic bill payments

- Get necessary vaccinations
- Make copies of important documents

1-3 Months Before Retirement

Phase 6

October 2026 - December 2026

- Close or transfer local accounts
- Cancel local subscriptions and services
- Host a farewell gathering
- Confirm housing arrangements
- Pack essential items for carry-on
- Arrange airport transportation
- Purchase travel insurance

Retirement Month

Retirement

January 2027

- Final home walk-through
- Confirm all accounts are in order
- Activate international phone plan
- Exchange currency

Depart for your new life abroad!

First 3 Months Abro

New Life

January 2027 - April 2027

- Register with local authorities (if required)
- Open local bank account
- Find local healthcare providers
- Join local expat groups
- Explore your new community
- Establish a daily routine
- Begin living your dream retirement!

2025 Affordable Retirement Abroad. All rights reserved.

Visit affordableretirementabroad.com for more retirement planning resources.