RETIREMENT VISION QUESTIONNAIRE

Many people find it easy to picture their retirement, a time when every day is a "vacation day." This may be true for you as well, but we find that some clients do not have a clear vision of what their retirement will be like. In planning for the financial aspects of your retirement, we also strive to help you prepare for other quality of life issues that retirees face.

The following questionnaire will help to get you thinking about your future, and it will help us focus on areas where you will need our assistance:

1. What would your ideal day be like?

2. Is that "ideal" a day you could conceive of every day?

3. How do you spend your leisure time now?

4. Can you/will you continue these same activities post-retirement?

5. What interests do you have that you may not have had the time or opportunity to explore while still working?

6. Will incorporating these new interests/activities be one of your goals?

7. Do you have close ties to your family?

8. Do you have many friendships, or people with whom you will socialize?

9. Do you have strong community involvement? Will this be an outlet for you?

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10. Will you want to downsize your residence as you age?

11. Will you consider relocation as you age (e.g., to a warmer climate or one closer to relatives/friends)?

12. Is living with family members a goal/possibility?

13. Do you enjoy traveling? Do you want to increase your travel in retirement?

14. With the extra time afforded to you, will you want to go out to eat more often? Will you want to go to more movies, plays/musicals, or other entertainment events?

15. Do you currently volunteer? Have you considered volunteer work?

16. How will you maintain your health and fitness in retirement? Will you work out at a health club or exercise at home? Do you want to take up fitness activities?

17. Can you conceive of a week without work? Does part-time work appeal to you?

18. Do you want to leave a legacy for your children or grandchildren?

19. Is there a charity or charities to which you wish to leave an endowment?

20. Do you have other legacy or charitable goals (e.g., having a wing of a building at your alma mater named after you)?

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