



Retirement Vision

Client Name _____

Date _____

Directions: Retirement signals a major life transition. To realize the potential of this stage in your life, it is important to spend time reflecting on the challenges and opportunities that lie ahead. To stimulate your thinking about this important topic, please respond to the following questions:

1. How do you plan to change your lifestyle (if at all) when you retire?

2. What will you miss most about the job you have today?

3. What are your biggest fears about your retirement?

4. What are you most looking forward to about your retirement?

5. What would the ideal week in your retirement life look like? How will you invest your time?

6. What are the top five to ten goals you would like to accomplish/experience in your lifetime?