

Retirement *Planning* Self Assessment

Assessing your feelings about retirement will go a long way toward achieving your goals.

Please respond to each statement by indicating your degree of agreement or disagreement.	Strongly Agree	Somewhat Agree	Not Sure	Somewhat Disagree	Strongly Disagree
I expect to outlive my average life expectancy by a number of years.					
I want to take full advantage of the early years of retirement to live life to the fullest.					
I believe I will collect most of the Social Security benefits that I am owed.					
I don't want to spend all the money I have on my retirement; I want to leave something to my heirs.					
I am concerned about living alone at older ages.					
I like the idea of working part-time in retirement in a job or field that I might enjoy.					
I want the early years of my retirement to be relaxed and worry-free.					
Health issues may determine how I approach retirement planning.					
I worry a lot about the possibility that my assets or income might run out in retirement.					
I worry about the impact of inflation on my retirement.					
I worry that I will make big mistakes in important decisions, such as a rollover.					
After retirement starts, I should preserve my assets by not taking much investment risk.					
I worry about paying for health care costs in retirement.					
I expect to live in a different house or community during most of retirement than where I live now.					

For more information contact:

<Name>

<Company>

<Address>

<Address>

<Phone>

<Email>