

RETIREMENT EXPLORATION EXERCISES

PERSONAL RETIREMENT DATA SHEET

DIRECTIONS: Complete the following questions that pertain to your ideas, plans, and current beliefs about retirement. Your answers will help you understand your current feelings so you can plan more effectively for your future.

1. I now plan to retire in either ____ years, or in ____.

2. At this time, the idea of retirement makes me feel:

1 2 3 4 5 6 7 8 9 10

Depressed Neither Good nor Bad Fantastic

3. As of this moment in my life my retirement planning program could be described as:

_____ Completed

_____ A good beginning

_____ Just being formulated

_____ None

4. How many people still depend upon you for emotional or financial support? _____

5. What are your greatest fears about retirement?

_____ Not having enough assets/income

_____ Inflation

_____ Lengthy illness

_____ Difficult family relationships

_____ Moving to the wrong home

_____ Being bored

_____ Not being productive/useful

_____ Missing my friends in my work setting

_____ Other

6. What are you looking forward to in retirement?

_____ Freedom to do what you want

_____ Time for hobbies and interests

_____ Starting a second career

_____ More time for family

_____ Making my own decisions

_____ Rest

_____ Other

7. I think the perfect age for me to retire would be _____.

8. I have three friends with whom I now feel comfortable sharing my concerns, fears and hopes about retirement. They are:

1. _____

2. _____

3. _____

9. Complete the following:

"I would like my retirement to be a time in my life when....."

FACTOR 6: CURRENT LIFE SATISFACTION

POWERFUL QUESTIONS

1. How happy are you with your life in general?
2. What changes would you like to make to increase your overall life satisfaction?
3. What has traditionally given you happiness?
4. What has typically given you happiness?
5. Are you happier now, or will you be happier in the future?
6. Who do you like to be around the most? Others? Yourself?
7. What is your happiest time of day? Happiest time of the week? Happiest time of the month? The year?
Your life?

FACTOR 7: PROJECTED LIFE SATISFACTION

POWERFUL QUESTIONS

1. How hopeful a person are you?
2. Do you generally see the glass half-empty or half-full?
3. Who is in charge of your tomorrow?
4. How will you manage friendships in your retirement? Will you keep the same friends in your retirement years as you have today?
5. Where will you live in your retirement? Will you have multiple residences?
6. In what ways do you think your retirement years will be a continuation of your life right now, or will there be changes?
7. How has life been for you up to this point...more a "bowl of cherries" or more a "trial by fire"?

FACTOR 8: LIFE MEANING

POWERFUL QUESTIONS

1. Where do you find meaning?
2. Where do you find awe, wonder, and delight?
3. Where does your sense of personal meaning come from now? Are you living a meaningful life? How aligned are you with your values?
4. How will you generate personal meaning in your retirement years?
5. What "causes" do you support? Financially? Volunteering? Politically?
6. What "lights your fire" of passion when you get up in the morning?
7. What would you like to become involved with in your retirement?