

PERSONAL RETIREMENT DATA SHEET

Retirement Exploration Exercise #E-1

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.....”
