

# Making the Most of Your Retirement Survey

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Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

## How soon do you want to retire?

\_\_\_\_\_ More than 10 years from now. I'm shooting for: \_\_\_\_\_ (*anticipated date*)

\_\_\_\_\_ Within the next 5 years. My target date is: \_\_\_\_\_ (*anticipated date*)

\_\_\_\_\_ I'm already retired. I retired on: \_\_\_\_\_

## What are your top questions about retirement?

(*mark all that apply*)

\_\_\_\_\_ How much money will I need?

\_\_\_\_\_ When will I have enough money to retire?

\_\_\_\_\_ Will I need to work in retirement?

\_\_\_\_\_ Do I want to work in retirement?

\_\_\_\_\_ Do I need my mortgage or other financial obligations paid off before I retire?

\_\_\_\_\_ How will I know if I have enough money saved for the fun things I want to do in retirement?

\_\_\_\_\_ Do I have enough savings for a vacation or "snowbird" home?

\_\_\_\_\_ How do I make sure I don't outlive my money?

\_\_\_\_\_ What do I need to budget for medical costs in retirement?

\_\_\_\_\_ What retirement income options are available?

\_\_\_\_\_ What opportunities are available within my portfolio to limit market volatility?

\_\_\_\_\_ How do I convert my savings into retirement income?

## What would you like to do next?

\_\_\_\_\_ Please include me in future events \_\_\_\_\_ Please send me financial updates

\_\_\_\_\_ Please arrange a free financial review. Best dates/times: \_\_\_\_\_

## What did you like or wish we had done differently at our recent event?

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