

Making the Most of Your Retirement Survey

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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