

What do you want from retirement?

Are you saving for retirement—or saving for life?

Your retirement years should be a period of continued growth and fulfillment. Here are 18 questions to spark conversations and look at the bigger picture about your goals, your future, and exactly why you're saving for retirement.

Instructions: Take a few minutes to think about your answers. Then, discuss your financial goals to achieve them.

A

What will you do with your time?



1. How do you view retirement?
 - a. ☐ A vacation
 - b. ☐ An adventure
 - c. ☐ A next act
2. What activities do you currently enjoy?
3. What new activities do you want to try?
4. What will these new activities require?
 - a. ☐ Learning new skills
 - b. ☐ Investing in myself
 - c. ☐ Taking some classes

B

What new things will you try?



5. Do you have any adventures planned for your retirement years?
6. Do you have any great travel destinations in mind?
7. Are there things you've always wanted to do if you only had the time?

C

Who will you spend your time with?



8. Do you belong to any professional groups, and do you plan to continue with these after you retire?
9. Are there new groups you'd like to join once you retire?
10. Will you keep up your professional skills, should you want to work?
11. How often do you connect with old friends?
12. In the last year, have you made new friends? If so, how did you find them?

D

**How will you
protect your health
to enjoy it fully?**



13. What will you do to maintain good health in retirement?

- a. ☐ Eat healthier
- b. ☐ Join a gym or exercise
- c. ☐ Get regular medical exams

14. How will you fund health-care costs in retirement?

- a. ☐ An HSA
- b. ☐ A Medicare plan + supplement
- c. ☐ A long-term care plan

15. What about your health could you improve before retirement?

E

**What current
interests do you
want to master?**



16. Do you have a hobby you'd like to spend more time doing?

17. Have you considered exploring a new career?

18. Do you know anyone who is doing something you'd like to do?

Now that you're done ... discuss your answers.

Review these areas with your financial professional to determine how you can best work together to “save for life” in the years ahead.

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