



## Retirement: Thinking It Through

Client Name \_\_\_\_\_

Date \_\_\_\_\_

**Directions:** Please indicate your thoughts and feelings about retirement by completing Exercises 1 and 2.

### Exercise 1: Views About My Retirement

		Yes	No
1	I'm counting the days until I can retire.	<input type="checkbox"/>	<input type="checkbox"/>
2	I expect my retirement to be very different from what my parents experienced.	<input type="checkbox"/>	<input type="checkbox"/>
3	I don't want to retire "cold turkey."	<input type="checkbox"/>	<input type="checkbox"/>
4	I worry about not having enough money when I retire.	<input type="checkbox"/>	<input type="checkbox"/>
5	I wonder what I am going to do with my time when I retire.	<input type="checkbox"/>	<input type="checkbox"/>
6	I worry that Social Security will not be available when I retire.	<input type="checkbox"/>	<input type="checkbox"/>
7	I haven't thought much about what I want to do when I retire.	<input type="checkbox"/>	<input type="checkbox"/>
8	I like being productive and would like to continue working after I retire.	<input type="checkbox"/>	<input type="checkbox"/>
9	I'm worried that my health will fail when I retire.	<input type="checkbox"/>	<input type="checkbox"/>
10	I have a clear vision of how I will invest my time and energy when I retire from my current position.	<input type="checkbox"/>	<input type="checkbox"/>

### Exercise 2: Personal Reflections

#### 1. What I most look forward to about retirement:

#### 2. What I am most concerned about in retirement: