

Name: _____

Date: _____

RETIREMENT PLANNING QUESTIONNAIRE

Understanding Your Retirement Vision

This questionnaire is designed to help us develop a retirement plan that aligns with your personal goals and aspirations. Please take your time and answer each question thoughtfully.

Envisioning Your Ideal Retirement

① Lifestyle

Describe your ideal day in retirement. What activities, hobbies, or interests do you envision yourself pursuing?

How do you plan to structure your time? Will it be a mix of leisure, volunteering, or other activities?

② Location

Where do you see yourself living in retirement? Is there a specific city, state, or country you're interested in?

What type of living environment appeals to you (e.g., urban, suburban, rural, waterfront)?

RETIREMENT PLANNING QUESTIONNAIRE - CONTINUED

③ Relationships

How important are relationships with family and friends in your retirement vision? How do you plan to stay connected?

Are there any specific family or social commitments you anticipate or desire?

④ Travel

Do you have travel aspirations? If so, where would you like to go and how often?

Are there any particular destinations or experiences you want to prioritize?

⑤ Giving Back

Are there any philanthropic / volunteer activities you're interested in pursuing?

How important is contributing to your community / causes you care about?

RETIREMENT PLANNING QUESTIONNAIRE - CONTINUED

⑥ Health and Wellness

How important is physical and mental well-being in your retirement? What steps are you taking or planning to take to prioritize your health?

Are there specific health or wellness goals you have for your retirement years?

Financial Goals and Priorities

① Income Needs

What level of income do you estimate you'll need to maintain your desired lifestyle in retirement?

Do you foresee any major expenses or financial commitments?

RETIREMENT PLANNING QUESTIONNAIRE - CONTINUED

② Financial Independence

Do you aspire to be financially independent? If so, what does financial independence mean to you?

Are there specific financial milestones you aim to achieve?

③ Legacy Planning

Do you have any specific goals for passing on your wealth or supporting causes you care about?

What are your thoughts on estate planning and inheritance?

④ Risk Tolerance

How comfortable are you with investment risk? Are you seeking growth, income, or preservation of capital?

Have you had previous investment experiences that influence your risk tolerance?

RETIREMENT PLANNING QUESTIONNAIRE - CONTINUED

Retirement Timeline

① Desired Retirement Timeline

When do you envision retiring?

Are there any factors that might influence this timeline?

How long do you anticipate your retirement lasting?

② Phased Retirement

Are you considering a phased retirement or continued part-time work? If so, what would that look like?

What roles or positions might you consider if you choose to work part-time?

RETIREMENT PLANNING QUESTIONNAIRE - CONTINUED

Challenges and Concerns

① Major Concerns

What are your biggest concerns or fears about retirement?

Are there specific financial, health, or lifestyle challenges that worry you?

② Potential Obstacles

Are there any potential obstacles you foresee in achieving your retirement goals?

What strategies or solutions have you considered to address these obstacles?

RETIREMENT PLANNING QUESTIONNAIRE - CONTINUED

Open-Ended Questions

① Success

What would you consider a successful retirement?

How do you define fulfillment and satisfaction in retirement?

② Family and Community Role

How do you envision your role in your family and community during retirement?

Are there any specific activities or contributions you hope to make?

RETIREMENT PLANNING QUESTIONNAIRE - CONTINUED

③ Regrets

What would you regret not doing in retirement?

Are there any experiences or accomplishments you feel are essential to your retirement?

By understanding your vision for retirement, we can work together to create a financial plan that supports your goals and aspirations.

Thank you for taking the time to complete this questionnaire. Your responses will be invaluable in crafting a retirement plan that aligns with your unique vision.