

Retirement Life Outline Questionnaire



Modeled from the Retirement Time Analysis (RTA) tool, this questionnaire walks you through the details of the life in retirement for you to plan an outline of what you feel a meaningful and purposeful life will be in retirement.

Your Lifespan:

See page 3 of your RTA report

Your Name: _____

I will spend _____ years in retirement.

I am surprised by this number. Yes No

If you checked "Yes," note if the number of years was higher or lower than you expected.

Lower Higher

Recommendations:

If you answered yes, and the number was higher than you expected, review with your financial planner to ensure your strategy aligns with the number you established.

If the number was lower than expected, discuss with your financial planner any changes to your plan that might afford you flexibility on spending. In addition, talk with your physician and see what changes you might be able to do now to help your long-term health.

I believe my life will be fulfilling and meaningful during this time. Yes No Not Sure

Recommendations:

If you answered yes, take the time to write down in detail why it will be meaningful and check that against your retirement financial strategy and the lifestyle and activities you have planned. Use the rest of this resource as a tool.

If you answered no or not sure, walk through each priority category of this resource, along with the details of your RTA to help open areas to create purpose for your life.

Notes

Retirement Life Outline Questionnaire



Current Career Mindset:

See page 5 of your RTA report

My classification is _____.
Classifications are Talented, Intelligent, Modest, or Explore

I agree with classification. Yes No Not Sure

I need to address the importance of my career and how I am going to be able to transition into retirement. Yes No Not Sure

Recommendations:

Conduct a Retirement SWOT Analysis to help you gain understanding on your current state and what you can do now to begin to evolve into a new way of life or decide how to maintain what you have for as long as possible.

I must learn to replace my career with other things that will bring direction and purpose to my life. Yes No Not Sure

Recommendations:

Complete a general event calendar, eliminating or reducing time spent at work and fill with activities tied to retirement. Where there are gaps, decide steps that can be taken to bring meaningful time into the mix.

I would like to work in some capacity while I am in retirement. Yes No Not Sure

Recommendations:

If you have answered yes to this question, start with your current employer and determine if an arrangement can be made for you to stay on in some role or capacity that will bring flexibility but still provide you with purpose.

Notes

Retirement Life Outline Questionnaire



Time Management:

See page 6 of your RTA report

My classification is _____.
Classifications are Talented, Intelligent, Modest, or Explore

I agree with the classification. Yes No Not Sure

I have a purpose in life right now, that is defined and written, that I can share with others.
Yes No

Recommendations:

Complete a Retirement Purpose Statement giving you a mission and/or vision testimony that will help guide and focus you on where are the best areas for your time.

I established short- and long-term goals today, that account for my time going into an while in retirement. Yes No

Recommendations:

Develop long term goals accounting for things like, the reasons, the ways to achieve, measuring, tracking, and then evaluating those ambitions.

I am organized, planned, and prepared because I have formalized processes and systems in place. Yes No

Recommendations:

Take the Time Management Analysis (TMA) report and see where you can improve or affirm your ability to be efficient in areas like organization, personal care, planning, task management, and focus.

Notes

Retirement Life Outline Questionnaire



Current Retirement Mindset:

See page 7 of your RTA report

My classification is _____.
Classifications are Talented, Intelligent, Modest, or Explore

I agree with the classification. Yes No Not Sure

I have invested time and effort to understand how I will live my life in retirement.
Yes No Not Sure

Recommendations:
Complete a Retirement Purpose Statement as well as a Retirement SWOT Analysis, giving you a mission and/or vision testimony that will help guide and focus your efforts.

I believe my personal life in retirement will provide me with both optimal contentment and the aspirations to do new things.
Yes No Not Sure

Recommendations:
Develop long term goals accounting for things like, the reasons, the ways to achieve, measuring, tracking, and then evaluating those ambitions.

My current retirement mindset conflicts with my current career mindset.
Yes No Not Sure

Recommendations:
Using the Retirement Purpose Statement, SWOT Analysis, and goal planning resources – review those results and build a plan to help align your career and retirement mindsets.

Notes

Retirement Life Outline Questionnaire



Financial Mindset:

See page 8 of your RTA report

My classification is _____.
Classifications are Talented, Intelligent, Modest, or Explore

I agree with the classification. Yes No Not Sure

I believe I am financially ready or will be ready to retire. Yes No Not Sure

Recommendations:

Sit down with your financial advisor and complete a detailed discussion around life expectancy, annual distributions, stress testing, healthcare costs, and long-term living. Know the specifics and really believe the reality of your situation.

I have developed a formal and detailed retirement budget from my financial retirement plan.
Yes No Not Sure

Recommendations:

Ask your financial institution for any resources they provide to let you establish a solid understanding of your expenditures. Know what it is to live on a "fixed income."

I have accounted for my health costs both now and in the future and is reflected in my financial retirement plan and budget. Yes No Not Sure

Recommendations:

Make sure you have accounted for long-term health care costs and that your current plan can support any potential needs in the future or if you should pursue the proper insurance.

Notes

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Anticipated Lifestyle:

See page 9 of your RTA report

My classification is _____.
Classifications are Talented, Intelligent, Modest, or Explore

I agree with the classification. Yes No Not Sure

I am physically active now and I will continue to plan to be physically active.
Yes No Not Sure

Recommendations:
Meet with your doctor and review your current physical condition and determine what steps should be taken to maintain an active lifestyle.

I have a formalized long-term detailed plan on where I will be living or residing in retirement.
Yes No Not Sure

Recommendations:
Where you are living now is likely not going to be your residence at some point in the future. Establish a plan with family on alternative options in case your health or mobility changes in the future.

I will or currently have an active social life in retirement that includes meeting frequently with friends and family. Yes No Not Sure

Recommendations:
Human interaction can decrease as retirement lengthens. Decide on how you can remain connected to others as relationships will change and adjust over time.

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Retirement Activities:

See page 10 of your RTA report

My classification is _____.
Classifications are Talented, Intelligent, Modest, or Explore

I agree with the classification. Yes No Not Sure

I plan to travel in retirement. Yes No Not Sure

Recommendations:

Travel is one of the costliest elements of retirement and one that takes up the most time. Using your Retirement Purpose Statement, SWOT Analysis, goal planning resources, and financial planner – review those results and build the right strategy.

I have created and I am working through a formal written bucket list.

Yes No Not Sure

Recommendations:

Prioritizing what you want to do and then working to achieve them can be better understood with a formal bucket list. You can find plenty of resources and apps to download that will help get you started.

I have an understanding of what hobbies I will have, volunteer activities, exercise, reading time, and TV/screen watching I will be doing. Yes No Not Sure

Recommendations:

Using the Retirement Purpose Statement, SWOT Analysis, goal planning resources, and financial planner – decide on what ancillary activities will be important to you.

Notes
