

Plan the Retirement You Want

Build your action plan



RETIREMENT

Unlocking your retirement thinking worksheet

Date _____

These questions, developed by Jeri Sedlar and Rick Miners, authors of **Don't Retire, REWIRE!**, can help you define the retirement you want.¹

1. Describe your vision for retirement.

2. What people, things, activities or actions currently give you great joy and fulfillment?

3. If you had the time, what interests/activities would you like to pursue?

4. How do you feel about the idea of retirement? Positive Negative Mixed

a. If positive, why? _____

b. If negative, why? _____

5. Financial preparedness and health have been cited as two key ingredients for a successful retirement. What else would you include? Cite as many examples as you think are important.

6. Do you plan to work for pay in retirement? Yes No

If yes, how would like to work? Full-time Part-time Seasonal

7. Beyond money, what are the reasons you would want to work?

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8. Do you have any ideas/interests that could be the basis for your new work? Yes No

If yes, what are they? _____

9. Do you currently do volunteer work? Yes No

Are you considering doing volunteer work in retirement? Yes No

If yes, what type: Board position Hands-on Fundraising Other

10. Do you have certain passions that would lead you to specific volunteer work? Yes No

Are you considering doing volunteer work in retirement? Yes No

If yes, what type: Board position Hands-on Fundraising Other

If yes, what are they? _____

11. Do you plan to travel in retirement? Yes No

Is there a theme to your travel? _____

12. In the new retirement model, many individuals want to balance leisure with some form of work. How do you plan to manage your financial resources in this new life phase?

13. Is your life in balance today? Yes No

What makes it so? _____

Want help to put your plan in place? Contact a Merrill Lynch Financial Advisor.

A Merrill Lynch Financial Advisor is someone who understands your situation, your needs and what you want to accomplish. Our understanding of you enables us to draw upon the breadth and depth of Merrill Lynch to bring you an appropriate solution at an appropriate time for you. Call (800) MERRILL (637-7455) or go to www.totalmerrill.ml.com/retirement to get started.

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