

Plan the Retirement You Want

Build your action plan



RETIREMENT

Discover Your Drivers worksheet

Date _____

Through research, the following 30 *drivers*—developed by Jeri Sedlar and Rick Miners, authors of **Don't Retire, REWIRE!**—surfaced as reasons why people worked beyond a paycheck.¹ As you contemplate new work/leisure options, it's important to know what motivates you today. The new retirement is about selecting new activities that continue to physically and emotionally fulfill you. A quick way to assess your drivers is to go through the list and rule out those that are obviously not important to you. Then focus on the remaining ones. The goal is to eventually drill down to your top five drivers.

- | | | |
|---|--|---|
| <input type="checkbox"/> To have accomplishments | <input type="checkbox"/> To be competitive | <input type="checkbox"/> To have intellectual stimulation |
| <input type="checkbox"/> To be constantly learning | <input type="checkbox"/> To wield power | <input type="checkbox"/> To use/develop skills and talent |
| <input type="checkbox"/> To be part of the action | <input type="checkbox"/> To be current or "in" | <input type="checkbox"/> To have global opportunities |
| <input type="checkbox"/> To make a difference | <input type="checkbox"/> To gain prestige | <input type="checkbox"/> To be connected |
| <input type="checkbox"/> To be an authority figure | <input type="checkbox"/> To have new experiences | <input type="checkbox"/> To have and share goals |
| <input type="checkbox"/> To mentor others | <input type="checkbox"/> To be a problem solver | <input type="checkbox"/> To have structure |
| <input type="checkbox"/> To belong | <input type="checkbox"/> To develop friendships | <input type="checkbox"/> To have an identity |
| <input type="checkbox"/> To pursue a passion | <input type="checkbox"/> To be recognized | <input type="checkbox"/> To be valued |
| <input type="checkbox"/> To be creative | <input type="checkbox"/> To be fulfilled | <input type="checkbox"/> To be a leader |
| <input type="checkbox"/> To have exposure to people | <input type="checkbox"/> To enhance self-esteem | <input type="checkbox"/> To have visibility |

What kind of retirement do you envision?

And how will you get there? It's more important than ever to begin planning early to pursue the retirement of your dreams. Your Merrill Lynch Financial Advisor can help guide you along the way. Or go to www.totalmerrill.ml.com/retirement.

¹ © 2007 **Don't Retire, REWIRE!** by Jeri Sedlar and Rick Miners. Reprinted with permission by Alpha Books, a member of Penguin Group (USA), Inc. Learn about the book at <http://www.dontretirerewire.com>.



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