

ACHIEVE THE RETIREMENT YOU WANT

BUILD YOUR ACTION PLAN



TOTAL MERRILL®

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

Q. Describe your vision for retirement. _____

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

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

Q. How do you feel about the idea of retirement? Positive Negative Mixed
a. If positive, why? _____

b. If negative, why? _____

Q. 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.

Q. Do you plan to work for pay in retirement? Yes No
If yes, how would you like to work? Full time Part time Seasonal

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

Q. Do you have any ideas/interests that could be the basis for your new work? Yes No
If yes, what are they? _____

Q. 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

Q. Do you have certain passions that would lead you to specific volunteer work? Yes No
If yes, what are they? _____

Q. Do you plan to travel in retirement? Yes No
Is there a theme to your travel? _____

Q. 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? _____

Q. 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.**

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L-07-09

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Code 312620PM-0709