

THE PRIVILEGE OF RETIREMENT



CROWN
COACHING • TRAINING

A photograph of a middle-aged couple smiling warmly at the camera. The woman has blonde, wavy hair and is wearing a grey knit sweater. The man is wearing a light blue polo shirt. They are positioned in the center of the frame, with a bright light source behind them creating a soft glow.

HOW MUCH DO YOU KNOW

ABOUT RETIREMENT?

PERSONAL RETIREMENT DATA SHEET

DIRECTIONS: Complete the following questions that pertain to your ideas, plans, and current beliefs about retirement. Your answers will help you understand your current feelings so you can plan more effectively for your future.

1. I now plan to retire in either ___ years, or in ____.

2. At this time, the idea of retirement makes me feel:

1 2 3 4 5 6 7 8 9 10
Depressed Neither Good nor Bad Fantastic

3. As of this moment in my life my retirement planning program could be described as:

- _____ Completed
- _____ A good beginning
- _____ Just being formulated
- _____ None

4. How many people still depend upon you for emotional or financial support? _____

5. What are your greatest fears about retirement?

- _____ Not having enough assets/income
- _____ Inflation
- _____ Lengthy illness
- _____ Difficult family relationships
- _____ Moving to the wrong home
- _____ Being bored
- _____ Not being productive/useful
- _____ Missing my friends in my work setting
- _____ Other

6. What are you looking forward to in retirement?

- _____ Freedom to do what you want
- _____ Time for hobbies and interests
- _____ Starting a second career
- _____ More time for family
- _____ Making my own decisions
- _____ Rest
- _____ Other

7. I think the perfect age for me to retire would be _____.

8. I have three friends with whom I now feel comfortable sharing my concerns, fears and hopes about retirement. They are:

1. _____
2. _____
3. _____

9. Complete the following:

“I would like my retirement to be a time in my life when.....”