



Please complete this survey. It is OK to answer “Don’t Know Yet”.

1.) What lessons have you learned from watching others who have retired from working, or who have reached financial independence?

Answer:

2.) How do you visualize your life when you are in your (forties, fifties) sixties, seventies and eighties? Where will you be, who will be there with you? What will make you smile? Who will you be helping?

Answer:

40s

50s

60s

70s

80s

3.) What consumes the majority of your non-work time today? Is this what you want to spend your time upon?

4.) Will you completely retire ever, or do you love what you do so much that you want to continue part time?

Answer:

5.) Are you concerned about having sufficient income to be Financially Independent at the time you will choose to work for fun (not just money), or when you completely retire? How will you each have the resources to lead a happy and fulfilling life?

Answer:

6.) Ask yourself: Will I be bored in retirement, in a permanent vacation? Do I want the satisfaction and income that part time employment provides? What will I do all day?

7.) How important is it for me to enjoy leisure and travel, and how will I do that?

Answer:

8.) How do I maximize my assets, and how important is this goal?

Answer:

9) Will I/we want to move after age 55? To where? How many times do I want to move in the rest of my life?

Answer:

10) How do I contribute to my family and/or community through unpaid work, if this is applicable – is it?

Answer:

11) Do I ever want to acquire any new hobbies? How do I want to make more time for the activities I don't have time to pursue when working?

Answer:

12) Do I want to help my children or nieces/nephews make ends meet?

Answer:

13) Do I want to assist with a grandchild's/niece's etc. education?

Answer:

14) If I am widowed, and remarriage occurs, will I want to have financial responsibilities for stepchildren/grandchildren?

Answer:

15) How can I be confident that I can pay for medical care and long term custodial care, whether I am 52 and out of work, or 92? How do I feel about nursing homes, and can I even afford one, or afford to avoid one?

Answer:

16) How do I ensure that I remain independent, even if a health crisis occurs? What will be the consequences of my living a long life on my family? Who will look after me?

Answer:

17) How can I ensure that our assets are protected and preserved for children and grandchildren, or do I want to use it all? Or do I know yet?

Answer:

18) Do I want to leave a legacy through charitable giving? Or do I know?

Answer:

19.) Remind Jake Engle to cover the 'Kinder 3 Questions' with you.