

**Retirement Planning
Self – Assessment
Part 1**

1. According to my best estimate, I will need to work full-time until I am _____(your age) before I will be comfortable with my financial situation.

2. I would like to work part-time after retirement to supplement my income.
Yes _____ No _____

3. Getting our (my) children through college and helping them get started in their careers is important before retirement.
Yes _____ No _____

4. There is a mortgage I (we) want to pay off before retirement.
Yes _____ No _____

5. We (I) have an aging parent(s) or relative who will need either financial or personal help after retirement.
Yes _____ No _____

6. I (we) will enter retirement with a health problem
Yes _____ No _____

7. My spouse (or partner) and I have some basic differences of opinion on what to do with our time after retirement.
Yes _____ No _____

Think of any other factors that will influence how and when you'll retire. Create a vision statement of what you'd like your retirement to be like.
