

# Achieving Your Retirement Vision

## UNLOCKING YOUR RETIREMENT THINKING

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? \_\_\_\_\_

\_\_\_\_\_

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- 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? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## What kind of retirement do you envision?

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



L-05-05

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22931



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Code 312620PM-0505