

Retirementality™ Profile

Name:

Date:

Directions: Within each group, choose the phrase that best describes you, with 4 being the best and 1 being the least. Do not leave any spaces blank, and be sure each group has a 1, 2, 3, and 4.

A	I love to kick back and relax.	A	I want to play every day.	
B	I love to spend time with family and friends.	B	I want to plan some family trips.	
C	I love exercising.	C	I want to pay more attention to my spiritual well-being.	
D	I love my work.	D	I want to use my abilities to help others.	LEISURE
A	I want to spend more time on hobbies and other interests.	A	I want to start working on my "bucket list."	A
B	I want to make deeper connections.	B	I want to start making memories.	
C	I want to expand my interests.	C	I want to get in better shape.	
D	I have a sense of calling.	D	I want to make a difference in the world.	CONNECT
A	I want to get away from work.	A	I want to wake up to an empty agenda.	B
B	I want to spend more time with my spouse.	B	I want to be more involved in my community.	
C	I want to seek balance and meaning.	C	I want to increase my energy level.	
D	I want to continue doing what I do.	D	I want to feel challenged intellectually.	RENEW
A	I want to visit a lot of places.	A	I have many interests to occupy my time.	C
B	I want to catch up with friends.	B	I want to connect with groups of people who share my interests.	
C	I want to prioritize my health.	C	I want to lower my stress level.	
D	I want to continue finding new challenges.	D	I want to continue using my skills.	ENGAGEMENT
A	I look forward to "every day is Saturday."	A	I want to travel.	D
B	I look forward to spending more time with the people who are important to me.	B	I want to invest in relationships.	
C	I look forward to more personal growth.	C	I want to read and learn more.	
D	I look forward to interacting with people I work with.	D	I want to be highly engaged in what I do professionally.	

LEGEND

A. LEISURE = PLAY, TRAVEL, HOBBIES

B. CONNECT = TIME FOR FAMILY /FRIENDS

C. RENEW = PHYSICAL/MENTAL/SPIRITUAL WELL-BEING

D. ENGAGEMENT = PROFESSION, HELPING OTHERS, PURPOSE