

My Retirement Worksheet

Name:

Date:

Directions: Look at the list of benefits you may receive from work and score how important each aspect is to you with 0 being the least important and 5 being the most.

1. Intellectual stimulation
2. To stay healthy
3. Social engagement
4. Enjoyment of competing
5. Fear of boredom
6. Growth and learning
7. Making an impact
8. Sense of relevance
9. Identity tied to my work
10. Talents and abilities are expressed through my work
11. Maintaining my lifestyle
12. Employer-sponsored benefits package
13. Money for extras
14. Can't afford to quit
15. Concerned about Social Security earnings restrictions
16. Would like to have more savings
17. Would like to pay down debt
18. Want to avoid drawing down assets
19. Have more to leave for heirs
20. Concerns about rising costs of living

LIFESTYLE
MOTIVATORS

ECONOMIC
MOTIVATORS