



Mini Pre-Retirement Assessment

Listed below are 10 questions which explore various areas/elements of your life as you approach retirement. Read each question and circle which is the most appropriate response for you right now.

The answer key is at the end.

1. My finances are in order and I feel confident about having enough money to retire.
Totally Disagree Somewhat Disagree Neutral Somewhat Agree Totally Agree

To answer questions 2-10:

- 1 = Totally Disagree
- 2 = Somewhat Disagree
- 3 = Neutral
- 4 = Somewhat agree
- 5 = Totally Agree

2. I am fully aware of my gifts and talents.
1 2 3 4 5

3. I have a plan about how to use my gifts and talents in personally rewarding and satisfying ways when I retire.
1 2 3 4 5

4. My social life is not dependent on my work relationships.
1 2 3 4 5

5. I know how I will keep myself mentally active, alive and alert when I retire.
1 2 3 4 5

6. I know how I will introduce myself when I no longer have a job, job title and corporate connection.
1 2 3 4 5

7. I have thought about how to put structure in my day when I no longer have work to provide structure.
1 2 3 4 5

8. I have a healthy lifestyle now (healthy weight, good eating habits, regular exercise) and plan to continue these practices when I retire.

1 2 3 4 5

9. I have a spiritual life that provides enlightenment, growth & comfort.

1 2 3 4 5

10. Assuming you are living with a spouse or significant other....

We have had in depth conversations about changes in routine, chores, cooking, cleaning, finances and family responsibilities when I retire.

(If this question does not apply to you, give yourself a 3)

1 2 3 4 5

Your answer for Question 1: _____

Score for Questions 2 thru 10: _____

Key:

Question 1: How you answer this question will simply give you an idea about how much (or little) flexibility you can expect as you look at and plan for the years ahead.

Questions 2-10:

If you score between 9-23:

You haven't given this much thought, have you? Give yourself some "me" time to think, reflect, and plan.

If you score between 24-35:

You have begun to think about the next stage of the journey but you still have some (maybe several?) unanswered questions.

If you score between 36-45:

You have done quite a lot of great work to ready yourself for the next phase.

If you would like to do some self-exploration that will support you to plan your life in retirement, please visit www.act2

For the Act 2 Basic Workbook. You can either purchase the workbook and do the exercises on your own or combine the workbook with 2 hours of coaching with Bev.

See: <http://act2.info/products-page/>

The choice is yours. The possibilities are endless.

Note: The exercises in the workbook are about life planning; not financial planning..

