

My SmartRetire® Profile

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

Sample

A 3
B 1
C 4
D 2

A___ I love to kick back and relax.
B___ I love to spend time with family and friends.
C___ I love exercising.
D___ I love my work.

A___ I want to play every day.
B___ I want to plan some family trips.
C___ I want to pay more attention to my spiritual well-being.
D___ I want to use my abilities to help others.

A___ I want to spend more time on hobbies and other interests.
B___ I want to make deeper connections.
C___ I want to expand my interests.
D___ I have a sense of calling.

A___ I want to start working on my "bucket list."
B___ I want to start making memories.
C___ I want to get in top shape.
D___ I want to make a difference in the world.

A___ I want to get away from work.
B___ I want to spend more time with my spouse.
C___ I want to seek balance and meaning.
D___ I want to continue doing what I do.

A___ I want to wake up to an empty agenda.
B___ I want to be more involved in the community.
C___ I want to increase my energy level.
D___ I want to feel challenged intellectually.

A___ I want to visit a lot of places.
B___ I want to catch up with friends.
C___ I want to make health a priority.
D___ I want to continue finding new challenges.

A___ I have many interests to take up my time.
B___ There are groups that I want to connect with.
C___ I want to lower my stress level.
D___ I want to continue using my skills at some level.

A___ I look forward to "every day is Saturday."
B___ I look forward to spending more time with the people who are important to me.
C___ I look forward to more personal growth.
D___ I look forward to interacting with people I work with.

A___ There are places I want to go.
B___ I want to invest in relationships.
C___ I want to read and learn more.
D___ I am highly engaged in what I do professionally.

Add up totals for each and record in the box below.

TOTALS: A = B = C = D =

My SmartRetire® Profile

Directions: Once you've totaled your findings, graph your "A" total on the Leisure line, "B" total on the Connect line, "C" total on the Renew line, and "D" total on the Work line. Draw a line to connect the dots. The results will help you and your advisor determine what is important to you and how to integrate your profile into your plans for the future.

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Leisure Connect Renew Work

(A TOTAL)_____ (B TOTAL)_____ (C TOTAL)_____ (D TOTAL)_____

LEGEND

- A. LEISURE = PLAY, TRAVEL, HOBBIES
- B. CONNECT = TIME FOR FAMILY/FRIENDS
- C. RENEW = PHYSICAL/MENTAL/SPIRITUAL WELL-BEING
- D. WORK = PROFESSION, HELPING OTHERS

My SmartRetire[®] Profile

Working it out

Retirement WORKsheet

Look at the following list of Reasons for Working and rank them 1-5 (with 1 being the lowest and 5 being the highest) in order of importance to you.

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

Existential Motivators: Add your total from numbers 1-10 = _____

Economic Motivators: Add your total from numbers 11-20 = _____

	0	10	15	20	25	30	35	40	45	50
Existential Motivators >										
Economic Motivators >										

