



How ready am I for retirement? My Retirement Readiness Test

Move confidently into the future™

Financial Transitions

		Yes	No	Not sure
Do you know what your living expenses will be during your retirement years?	You Spouse			
Do you have enough guaranteed monthly income to pay all of your basic expenses?	You Spouse			
Will you have health insurance after you retire?	You Spouse			
Do you have an emergency fund that you don't need to spend for basic expenses?	You Spouse			

Lifestyle Transitions

		Yes	No	Not sure
Do you spend more than 5 hours a week on hobbies?	You Spouse			
In the past 5 years have you taken a vacation that lasted more than one week?	You Spouse			
Do you perform any regular volunteer work?	You Spouse			
Are you able to leave your work at work in the evenings and on the weekend?	You Spouse			

Emotional Transitions

		Yes	No	Not sure
Is your spouse/significant other ready to retire?	You Spouse			
Are you or your spouse not healthy enough to work anymore?	You Spouse			
Do you have friends you did not meet at work?	You Spouse			

TOTALS

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How ready for retirement are you?

< 6 NOs = Congratulations! You Are Well On Your Way!

6 – 10 NOs = Spend More Time With Your Advisor to Get Prepared.

10+ NOs = You're Not Ready – Meet with Your Advisor Soon!

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