



Think about your goals and dreams

How do you envision your retirement? With hectic schedules and competing priorities, most people don't take the time to really think about what their lives might be like when they retire. Now is the time to think about what you – or you and your spouse or partner – want for this next phase of your life. Use this worksheet as a guide to help you document your goals.

Questions to get you started

- What do I *want* to do once I reach retirement? Relax, travel, golf, pursue a passion, volunteer, work part-time? How does that compare to what my spouse/partner wants?
- Where do I want to live as I get older? Do I want to keep my current house? Downsize in the same town? Move to another location?
- Am I looking forward to retirement or dreading it? Why?
- How will my days be different once I stop working or when my spouse/partner stops working?

Because your personal goals for retirement are the foundation for a retirement income strategy, the better you can define your lifestyle needs, obligations, and concerns about retirement, the better you can build a plan to help meet those goals. If you have a spouse/partner, talking about and comparing your goals may be quite eye-opening. It's important to build a plan to accommodate both sets of goals.

How do you plan to spend your time?

Work	_____%
Travel	_____%
Volunteer	_____%
Leisure	_____%
Wellness	_____%
Other	_____%
Total	100%

How does your spouse/partner plan to spend their time?

Work	_____%
Travel	_____%
Volunteer	_____%
Leisure	_____%
Wellness	_____%
Other	_____%
Total	100%

Notes

Investments in Retirement Plans Are:		
Not Insured by the FDIC or Any Federal Government Agency	Not a Deposit or Other Obligation of, or Guaranteed by, the Bank or Any Bank Affiliate	Subject to Investment Risks, including Possible Loss of the Principal Amount Invested

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