



CLIENT INFORMATION FOR ADVISOR

CLIENT NAME: _____ DATE: _____

Understanding Your Needs

Now that you've explored and refined your interests, we'll continue to work together throughout the retirement planning process. Identifying what you love to do will help us better understand the resources needed for your lifestyle and retirement goals. Transfer the information from your Retirement Activity Book to this form. I recommend that you complete the form at home and bring it to our next meeting.

PUTTING THE PIECES TOGETHER

Write the two profiles that are most similar to your personality based on your highest scores.

First profile: _____ **Second profile:** _____

Write the two activities that you enjoy most at work and after work and why they make you feel fulfilled.

Activities I enjoy most at work:	Why I feel fulfilled by these activities:
1. _____	1. _____
2. _____	2. _____

Activities I enjoy most after work:	Why I feel fulfilled by these activities:
1. _____	1. _____
2. _____	2. _____



DEFINING YOUR RETIREMENT

Write your three potential retirement activities in the spaces below:

1.

2.

3.

IDENTIFYING YOUR FIRST STEPS

Choose one of your three potential retirement activities, or one of your five dreams, and write the short-, mid- and long-term action steps to make it happen.

Short-Term Goals (1-5 years)

Mid-Term Goals (5-10 years)

Long-Term Goals (10 years or more)

NEXT STEPS TO CONSIDER

- 1 | I hope to retire in _____ years
- 2 | My partner wants to retire in _____ years
- 3 | I have discussed my retirement ideas with my partner: Yes No
- 4 | Number of children or dependants _____

5 | I anticipate the next significant change in my life to be:

- Retirement Starting a family
 Career Change Buying a business
 Other: _____

6 | Other relevant family information:



What are you doing after work?®