



The Right Retirement Mindset

Excitement & Concerns



At the end of the day, the right retirement mindset comes from confidence and peace of mind. There are topics that will excite you and concern you which is completely normal. Sit down by yourself, with a spouse, friend or family member to answer these questions. They are meant to start a dialogue so that you can begin to paint a picture of your retirement.

- ✓ **What excites you most about retirement?** _____
- ✓ **What will your days look like? Any Hobbies?** _____
- ✓ **Are you in your forever home? Would you move to another state?** _____
- ✓ **How much traveling would you like to do?** _____
- ✓ **Any legacy goals for family, friends or charities?** _____
- ✓ **Do you have any family health issues? (Dementia, Cancer, etc.)** _____
- ✓ **Have you had any experience with family members and long term care? If not, have you thought about who would take care of you?** _____

- ✓ **Does the media give you anxiety during difficult times? What if there was a stock market correction?** _____

- ✓ **What other concerns or fears do you have about retirement?** _____
- ✓ **Anything else to think about?** _____