

Retirement Preparedness Self Assessment

NAME

DATE

Please answer the following questions - Yes; No; Unsure or Does Not Apply

1. I have accurately projected my retirement income needs and sources of income

2. Stability in the value of my investments is critical

3. I am comfortable in taking higher risk to achieve long term growth

4. I am satisfied with the current rate of return on my investments

5. My spouse/partner actively participates in our financial affairs

6. I am satisfied that my investments and pensions will provide adequate income for life

7. My current standard of living will continue if I have a severe accident or illness

8. My life insurance program will enable my family to maintain their present lifestyle

9. My will is current and consistent with my wishes

10. I understand how taxes will be applied to my estate

11. Preserving my estate is very important