Quality of Life Worksheet

Three questions can predict your
future quality of life

When you consider retirement planning, it's easy to lose sight of the forest for the trees. The first thing that comes to mind is probably, "How much money will I need?" But your finances are only part of the equation for a meaningful retirement. What may be more important is identifying the factors that can determine your future quality of life. The following three questions are a great place to start creating a broader, more holistic approach to living longer and living well.

Who will change my light bulbs?

How will you continue living in your home safely and independently? Identify the costs as well as the trusted service providers necessary to maintain your home in the future.

Service	Provider	Cost (monthly)
House cleaning		
Laundry		
Grocery delivery		
Lawn care & landscaping		
Home maintenance & basic repairs		
In-home medical services & devices		
Other		
Other		
Total		

How will I get an ice cream cone?

What do you like to do? Will you have adequate transportation to go where you want—when you want—in the future? Consider whether you'll get there by car, public transportation, or even fly.

List examples in each category.

Hobbies

_____
_____
_____

Travel

_____
_____
_____

Volunteer

_____
_____
_____

Time with Family & Friends

_____
_____
_____

Career (working at a job you enjoy)

_____
_____
_____

Other

_____
_____
_____

Who will I have lunch with?

Who are your closest friends and mentors? Who adds special value or has a specific role in your life? Who will you continue to depend on for advice or enjoying shared experiences?

List those connections here.

Name:

1. _____
2. _____
3. _____
4. _____
5. _____

Name:

1. _____
2. _____
3. _____
4. _____
5. _____

✓ ☐ Attend a senior center

✓ ☐ Do volunteer work

✓ ☐ Enroll in a college course

✓ ☐ Frequent your neighborhood coffee shop

✓ ☐ Use online social networking to meet other retirees

✓ ☐ Join a travel club

✓ ☐ Enroll in an exercise class

✓ ☐ Ask family and friends to introduce you to others

Schedule an appointment with your financial professional today so you can plan together for a meaningful retirement.

✓ ☐ Appointment date and time _____