

# Non-Financial Retirement Readiness Questionnaire



Name: \_\_\_\_\_

## Purpose & Meaning

What will give your life a sense of purpose once you are no longer working?

- ☐ Volunteering
- ☐ Pursuing hobbies
- ☐ Spending time with family
- ☐ Other: \_\_\_\_\_

## Daily Routine

Do you envision spending a typical day in retirement? What activities will fill your time?

- ☐ Exercising
- ☐ Reading
- ☐ Traveling
- ☐ Other: \_\_\_\_\_

## Social Connections

How do you plan to stay socially engaged after leaving the workplace?

- ☐ Joining clubs or groups
- ☐ Attending social events
- ☐ Staying in touch with friends and family
- ☐ Other: \_\_\_\_\_

## Mental Stimulation

What strategies or activities will you use to stay mentally sharp and intellectually stimulated?

- ☐ Learning new skills
- ☐ Playing games or puzzles
- ☐ Reading or writing
- ☐ Other: \_\_\_\_\_

## Physical Health & Wellness

How do you plan to stay physically active and maintain your health during retirement?

- ☐ Regular exercise
- ☐ Healthy eating
- ☐ Regular medical check-ups
- ☐ Other: \_\_\_\_\_

## Living Arrangements

Do you plan to stay in your current home, downsize, relocate, or explore other living arrangements?

- ☐ Stay in current home
- ☐ Downsize
- ☐ Relocate
- ☐ Other: \_\_\_\_\_

## Family & Relationships

How involved do you want to be with children, grandchildren, or other family members in retirement?

- ☐ Very involved
- ☐ Somewhat involved
- ☐ Not involved
- ☐ Other: \_\_\_\_\_

## Travel & Leisure

Are there specific places you want to travel to or hobbies you want to explore in retirement?

- ☐ Travel to new places
- ☐ Explore new hobbies
- ☐ Both travel and hobbies
- ☐ Other: \_\_\_\_\_

## Volunteerism & Giving Back

Do you see yourself volunteering, mentoring, or contributing to your community in some way?

- ☐ Volunteering
- ☐ Mentoring
- ☐ Contributing to community projects
- ☐ Other: \_\_\_\_\_

## Identity & Transition

How do you feel about transitioning away from your professional identity? What might you miss most?

- ☐ The sense of accomplishment
- ☐ The social interactions
- ☐ The routine
- ☐ Other: \_\_\_\_\_

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