

Questions & Responses For Discussion



Overview questions

- *On a scale of 1-10 how closely does this page reflect who you are?*
- *Do you think you're the same person at home as you are at work, or do you differ in how you view or do things? For example are you more introverted or extroverted at work or home, or are you a better planner at work versus home etc?*
- *In the first box (personal profile box), do you see any variances (conflicts) with your personality or preferences and how you have planned or expect the first year of retirement to go in terms of your daily routine, volunteering, working out, or social activity?*

Personal Profile List Sample

- | | |
|---|---|
| <ul style="list-style-type: none">▪ <i>Type B personality (Relaxed, patient, flexible)</i>▪ <i>Left Brain (Logical, analytical, detail-oriented)</i>▪ <i>In between but more of an extrovert</i>▪ <i>I'm more of a go with the flow type</i>▪ <i>Work behind the scenes</i> | <ul style="list-style-type: none">▪ <i>Current routine, tried and true plus new things</i>▪ <i>Nothing specific for my first year</i>▪ <i>No immediate plans to volunteer</i>▪ <i>Existing things for physical fitness</i>▪ <i>Invited to 3-5 social events recently, with 3-5 asks</i> |
|---|---|

Possible responses (left column)

Q#23: Would you consider yourself to be more of a?
Type A Personality (Competitive, Driven, Time Sensitive)
Type B Personality (*Relaxed, Patient, Flexible*)

Q#24: Would you consider yourself to be more of a?
Right brain person (creative, intuitive, freethinker)
Left brain person (logical, analytical, detail-oriented)

Q#25: Would you consider yourself to be more of an?
Introvert (content, inwardly expressive)
Extrovert (outgoing, outwardly expressive)
In between but more of an introvert
In between but more of an extrovert

Q#29: *Do you consider yourself more of a?*
Planning type who likes to know what you are doing
Go with the flow type person

Q#31: *You are planning an event, would you?*
Take the lead and organize everything
Be the MC of the event
Be part of the audience
Work behind the scenes

Possible responses (Right column)

Q#28: When it comes to your regular routine, you prefer?
To pick and choose how each day goes with some structure but not too much routine
Tried and true ways some of the time but other times I desire new and different things
A structured and consistent routine to help check off the boxes in an orderly fashion

Q#46: In my first year of retirement?
I don't have a list of specific goals or things
I have an idea of general things
I have a specific list

Q#43: When it comes to physical fitness?
I don't have a current routine
I have a general idea
I have specific plans
I have existing things

Q#47: With regard to volunteering, once I retire:
I don't have any immediate plans to volunteer
I want to have an impact in some way, but I haven't decided with who or how
I have a clear vision and specific group I want to work with
I have a clear vision and specific group I have already worked with

Q#40 and #41: How many non-work-related events have you been invited to participate in and how many non-work-related events have you invited other people to participate in the last month?
0-2
3-5
6 or more

<p>Keys to a positive retirement Close to friends, Volunteer, Financially secure</p> <p>Issues with a challenging one Few Friends, Too much TV, Inflexible</p>	<p>What are your two biggest non-financial fears heading into retirement? Declining mental health, Caregiving role</p>	<p>Existing passion, hobby, or role that defines you? Sort of</p> <p>I expect my overall life satisfaction in retirement to be: Better / Higher</p>
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Keys to a positive retirement

Why are these important to you and how are you going to make them part of your transition?
What made you pick these? Any particular people or situations you've come across

Issues with a challenging retirement

How have you seen these factors cause people to struggle with the transition and what things can you put in place to make sure they don't show up in your everyday retirement?

What are your three biggest non-financial fears heading into retirement?

Which one of these are your biggest concerns and I'd like to hear a little bit more about it

Existing passion, hobby, or role that defines you?

If yes, what are they?

If sort of or no, are there things you did in the past that you would like to pick back up. If you were retired right now, what would you want to make time to do?

I expect my overall life satisfaction in retirement to be:

How do you see things getting better

How might things get worse?

You see things as being the same, tell me more about that.

How does your response for life to get (Better/Worse/Stay the same play into the next section and your current mental, social, physical, spiritual life?

Current status of mental, social, physical, spiritual life on a scale 1-5

Overall attitude about getting older:	3/5
Overall physical well-being:	3/5
Overall relationship with friends:	4/5
Overall relationship with family:	4/5
Overall spiritual well-being:	4/5

Current status of mental, social, physical, spiritual life on a scale 1-5

Looking at this section, is there anything that stands out for you? Is there an area you want to move from say a "3" to a "4" or "4" to a "5." What might that entail?

<p>How satisfied are you with your life's work and the accomplishments within it?</p> <p>5/5</p>	<p>Based on the things I've been through in the past, I would consider myself to have what degree of resilience.</p> <p>4/5</p>	<p>To what degree do you feel you have led a full life so far?</p> <p>5/5</p>
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Life's Work, Resilience, Full Life

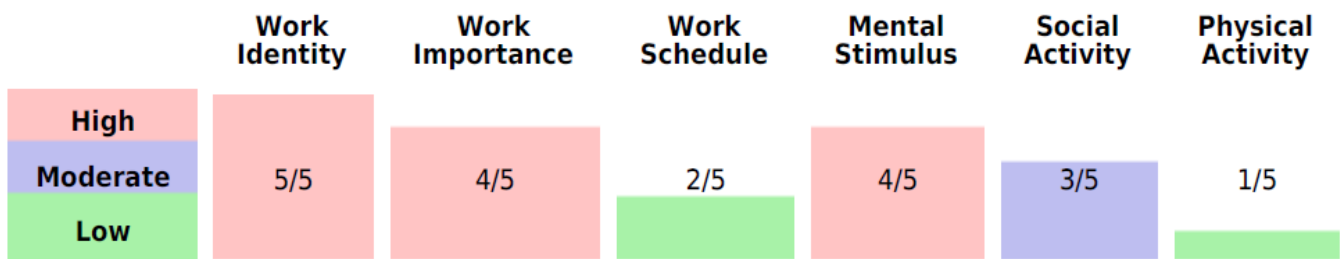
Can you share with me a couple highlights of your work life?

Would you like to see if get to a "4" or "5." If so, what would need to happen?

What factors or situations have contributed to your sense or degree of resiliency. How might those factors help you with or in retirement?

What are some of the key or important aspects to your definition of a full life?

Work Factors Quick Summary



Can you give me a quick synopsis of your work life and what you do? How has it contributed to the sections above including work life accomplishments, resiliency, and living a full life?

What aspects of your work life would you miss the most in retirement?