

Retirement Intelligence RQ Assessment



Part I: Retirement Knowledge and Awareness

This first section of the Retirement Assessment will look at how familiar you are with what retirement is, the establishment of retirement and how well you see yourself fitting into it.

- 1) If you had to compare the things that you will get or gain by retiring with the things you would lose or leave behind, do you believe you will gain more, lose more, or that things will balance out?
 - a. Gain more
 - b. Lose more
 - c. Balance each other out (gain some / lose some equally)

- 2) What three factors do you feel are most important for a successful transition? (Select 3)

a. Have a new identity	g. Are close to friends	m. Volunteer
b. Feel financially secure	h. See family regularly	n. Are generous
c. Have a spiritual life	i. Work part-time	o. Are flexible
d. Starting a business	j. Exercise regularly	p. Eat healthy
e. Life-long learner	k. Active in the community	q. Frequent Traveler
f. Like to try new things	l. Have a good memory	r. Not looking or acting old

- 3) Do you personally know an individual or couple who has successfully embraced at least two of the factors you selected above?
 - a. Yes
 - b. No

- 4) What three factors do you feel contribute to a difficult or challenging transition into retirement? (Select 3)

a. No new identity	f. Have few friends	k. Don't volunteer
b. Are on a tight budget	g. Limited family interaction	l. No spiritual life
c. Have to work part-time	h. Rigid and not flexible	m. Don't exercise
d. Unhealthy diet	i. Watch too much TV	n. Alcoholism / addiction
e. Memory is fading	j. Are pessimistic	o. Act old and out of touch

- 5) Do you personally know an individual or couple who has struggled with two or three of the factors you selected above?
 - a. Yes
 - b. No

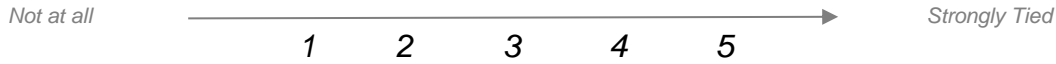
- 6) There are 43 different factors on the list of Most Stressful Life Events. Where does *retirement* rank?
- It's not on the list
 - It's in the top 10
 - It's somewhere in the middle
 - It's near the end / bottom of the list (i.e., not very stressful)
- 7) What percentage of 65+ Americans are believed to be impacted by the *dark side of retirement* which can include one or more of the following factors: isolation, depression, alcoholism, or addiction?
- 0- 25%
 - 26-50%
 - 51-75%
 - 76-100%
- 8) Do you have a written plan to help you? (Select all the apply)
- Replace your work identity
 - Fill your time
 - Stay relevant and connect
 - Keep mentally and physically active
 - Express your spiritual beliefs
 - Feel financially secure
 - None of the above

Part II: Work Life

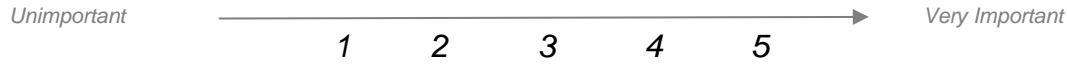
In our second section we will examine how you perceive your professional life and a variety of factors associated with it.

- 9) When it comes to work your present attitude / mindset surrounding your career and work?
- I'm sick and tired of all of it and want out as soon as possible
 - I've worked hard to get to retirement and am ready for a better life
 - I'm not sure, part of me wants to go but another side would like to stay beyond a traditional timeframe for retirement
 - I enjoy my work and would work longer but feel some pressure by my family, work, or age to retire
 - I love my work and just can't see exiting within a traditional time frame no matter what others may think or say
- 10) Are there any specific factors related to work that are contributing to your retirement / retirement decision?
- Keeping up with technology
 - New or changing management
 - Challenges with co-workers
 - Company politics
 - Friends are retired or retiring
 - Buy-out offer
 - Company closing
 - Age-based requirement
 - None of the above

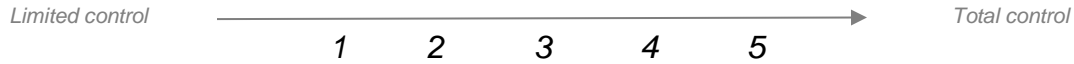
11) How much of your identity is associated with work or how important is your job to your sense of who you are and what people know you for?



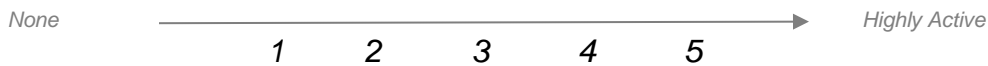
12) How important is your work to you?



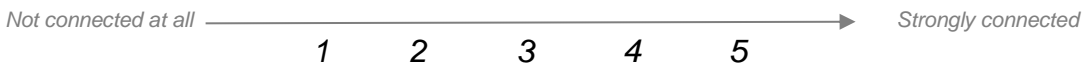
13) To what extent does your work control your time and schedule?



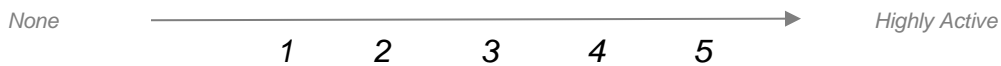
14) To what degree does your work require or provide mental stimulus and problem-solving skills?



15) To what degree do you depend on co-workers for social activity and camaraderie?



16) To what degree does your work require or include physical activity?



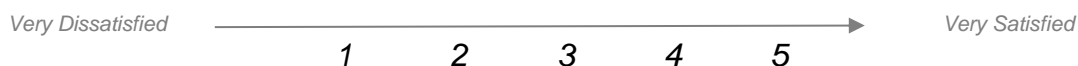
17) Professional failures are hard to forget, and workplace success are hard to remember?

- a. True
- b. False

18) When there is fundamental change in the workplace, do you struggle to come around to new ways of thinking or doing things?

- a. True
- b. False

19) How satisfied are you with your life's work and the accomplishments within it?



20) Do you plan to work part-time, seasonally, or start a business in retirement?

- a. No
- b. Yes, primarily for monetary reasons / support
- c. Yes, primarily to help fill my time
- d. Yes, primarily for social connection
- e. Yes, primarily to have an impact on others

Part III: Personal Life

In this final section we will be looking at your personal style and preferences. This deep dive into how you perceive yourself will help us highlight areas in which you are poised to thrive in retirement and identify potential issues that could hinder your success during it.

21) What are your three biggest non-financial fears heading into retirement? (Select 3)

- a. Staying connected to family and friends
- b. Staying relevant, up-to-date, or savvy
- c. Losing a loved one
- d. Loss of purpose or direction
- e. Deterioration of physical health
- f. Deterioration of mental health
- g. Life-altering medical diagnosis
- h. Managing my time
- i. Stress or Constraints associated with a caregiving role
- j. Change in relationship status

22) Do you expect your overall life satisfaction in retirement to be?

- a. Worse / Lower
- b. About the same
- c. Better / Higher

23) Would you consider yourself more of a?

- a. Type A Personality (Competitive, Driven, Time Sensitive, Assertive)
- b. Type B Personality (Relaxed, Patient, Flexible)

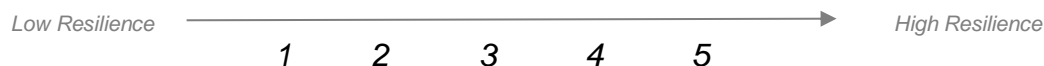
24) Would you consider yourself more of a?

- a. Right brain person (creative, perceptive, intuitive, and freethinker)
- b. Left brain person (logical, analytical, and detail-oriented)

25) Would you consider yourself more of a?

- a. introvert (content, inwardly expressive)
- b. extrovert (outgoing, outwardly expressive)
- c. In between but more of an introvert
- d. In between but more of an extrovert

26) Based on the things you've been through in the past, how would you rate your degree of resilience or your ability to work through and bounce back from a challenging situation.



27) Do you have an existing passion, hobby, or role that defines you (that people know you for) outside of the workplace? (For example, working on classic cars, painting, handy work, volunteering, side business, fishing or hunting, knitting / crafting, writing, travel)

- a. Haven't thought about it
- b. No, not really
- c. Sort of
- d. Yes

- 28) When it comes to your regular routine do 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 crave new and different things
 - A structured and consistent routine to help check off the boxes in an orderly fashion

- 29) Do you consider yourself more of a?
- Planning type who likes to know what you are doing
 - Go with the flow type person

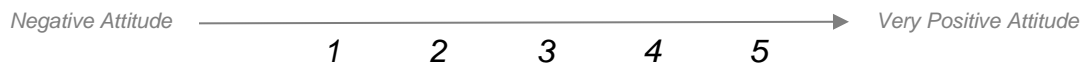
- 30) When I am bored, my most common behavior is? (Select one)
- Watch TV / Listen to media
 - Nap
 - Call a friend
 - Go outside/ walk
 - Read a book
 - Eat / drink
 - Other

- 31) You are part of a group that is going to plan an event, are you the type who would?
- Take lead and organize everything
 - Be the MC of the event
 - Be part of the audience
 - Work behind the scenes, either backstage or concession stand

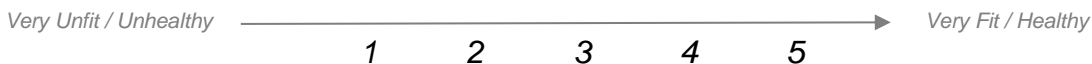
- 32) In your personal life, it's more common for you to reflect on your failures rather than your successes?
- True
 - False

- 33) Do you struggle to come around to new ways of thinking and new ways of doing things?
- True
 - False

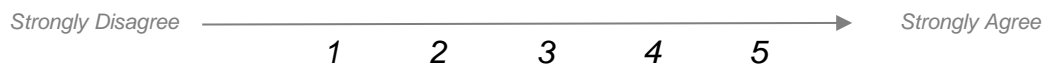
- 34) How would you rate your overall attitude and mindset around getting older and retirement?



- 35) How would you rate your overall physical health and well-being?



- 36) How would you rate your overall relationship and closeness with friends?



- 37) How would you rate your overall relationship and closeness with family?



38) How would you rate your overall spiritual well-being (meaning living out your core values and beliefs each day and / or pertaining to a religious group / philosophy)?

Not Where I Want It Be ————— *Very fulfilled*
1 2 3 4 5

39) My social network and people I feel most comfortable with are?

- a. Primarily in the workplace
- b. A 50/50 mix of both (if it's not a 50/50 mix please choose another option)
- c. Mostly outside of the workplace

40) How many non-work-related events have you been invited to participate in over the last month?

- a. 0-2
- b. 3-5
- c. 6 or more

41) How many non-work-related events have you invited other people to participate in over the last month?

- a. 0-2
- b. 3-5
- c. 6 or more

42) Select the various technologies you are proficient with? (select all that apply)

- a. Texting
- b. Group texting
- c. Internet searches
- d. Email
- e. Using email on your phone
- f. Using social media like Facebook (posting and commenting)
- g. Video conferencing like Zoom, GoTo Meeting, or Microsoft teams
- h. Streaming services like Netflix, Amazon Prime, Discovery +
- i. Paying bills online
- j. Ordering online
- k. Paying other people through Venmo, Zelle, or PayPal
- l. Sending a picture on your phone to family or friends
- m. Watching videos on YouTube
- n. Posting a video on social media
- o. Scanning and emailing documents
- p. Deleting and blocking scam, phishing, or spam emails

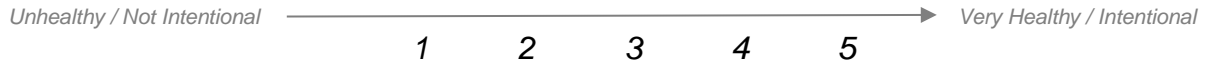
43) When it comes to physical fitness?

- a. I don't have a current routine and haven't considered developing one yet
- b. I have a general idea for what I hope to do in retirement
- c. I have specific plans for what I plan to do in retirement
- d. I have existing things I am already doing that I want to continue or do more of

44) Do you have a regular and consistent exercise routine that you follow?

- a. No, not right now
- b. Yes, but I'm consistently inconsistent
- c. Yes, and I'm moderately consistent
- d. Yes, and I am very consistent

45) How would you rate yourself as a healthy, conscious eater?



46) In my first year of retirement?

- a. I don't have a list of specific goals or things I want to do or need to accomplish yet
- b. I have an idea of general things I'd like to do in terms of general retirement activities
- c. I have a specific list of items that are important for me to check off sooner than later in certain areas like travel, family, and hobbies

47) With regard to volunteering, once I retire?

- a. I don't have any immediate plans to volunteer
- b. I want to have an impact in some way, but I haven't decided with who or how
- c. I have a clear vision and specific group I want to work with
- d. I have a clear vision and specific group I have already worked with

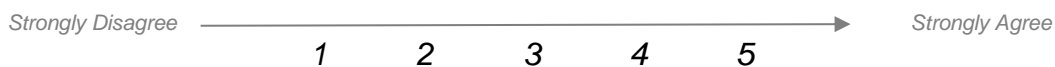
48) Once I am officially retired, I plan to introduce myself by saying? (select one)

- a. Haven't thought about it and will figure it out when I get there
- b. I'm retired
- c. I'm a full-time: grandparent, caregiver, or other family related role
- d. Something cute or funny like "Honey do lister" or "Daycare provider"
- e. Volunteer for _____ organization or group
- f. Something about an encore career, part-time work, or starting a business
- g. Student in terms of going back to school or learning a new set of skills
- h. Something related to recreational activities, Avid golfer, skier, pickle ball player, walk

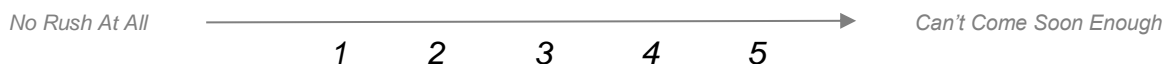
49) When it comes to learning new things, I prefer to?

- a. Listen to them
- b. Watch them
- c. Read them
- d. Experience them

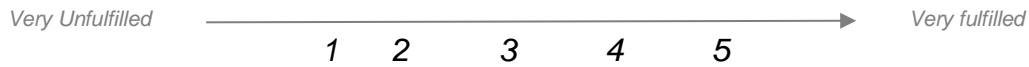
50) How would you rate yourself as life-long learner?



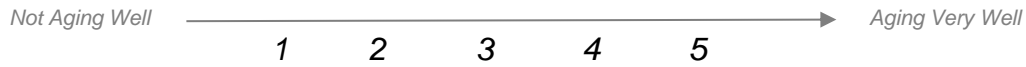
51) How much are you looking forward to the day when you will retire?



52) To what degree do you feel you have led a full life so far?



53) How well do you think you are aging?



54) What is your family's average life expectancy?

- a. Premature: Generally passing before age 79
- b. Average: Generally passing between ages 80-87
- c. Long: Generally passing beyond the age of 88

55) Based on your family health history, current medical condition, and lifestyle what is your anticipated longevity?

- a. Premature: Possibly passing before age 79
- b. Average: Possibly passing between ages 80-87
- c. Long: Possibly passing beyond the age of 88

56) How well do you think you are prepared for the non-financial aspects of retirement?

(Replace your work identity, fill your time, stay relevant and connect, keep mentally and physically active, express your spiritual / personal beliefs)

