



Retirement Life Assessment

Each of the statements below corresponds to a section in Circle Back to Your Dreams coaching process. By assessing the degree you agree with these statements you can gain insight into how prepared you are for many of the non-financial aspects of retirement. Rate yourself using the following scale.

No way	Occasionally	Often	A lot	Totally
1	2	3	4	5

	To what degree do you agree with the following statements on a scale from 1-5.	Rate
1.	I am able to choose a retirement that suits me and is not meant to please anyone else except, possibly, immediate family.	
2.	More than finances need to be replaced when retiring. I know how I will replace those (non-financial) aspects of my work that will no longer be provided when I retire.	
3.	I believe when a person retires it signifies the beginning of the end for them.	
4.	My conception of retirement is a life of leisure.	
5.	My conception of retirement is a balance between leisure and active involvement.	
6.	When I no longer have the title of _____ I'm not sure what people will think of me.	
7.	I make my own decisions regarding my future and have enough confidence in them to move forward.	
8.	I have conceived a general intention or direction for what to do with my retirement that will bring me the most joy, be of the most significance, and keep me deeply engaged for many years.	
9.	I have at least 10 prioritized options for how to fulfill the intention or direction referred to in the last statement.	
10.	I have a plan for how to go about experimenting with my retirement options and a way to evaluate the results.	
11.	11. I put together a team or board of directors whose mission is to provide me feedback, feed-forward, ideas, resources and motivation for me to achieve or get what I'm after.	
12.	My resilience is sufficient to withstand the slings and arrows that will surely come my way as I attempt this transition.	
	Subtotal: Add the ratings for statements 1-12	
	Subtract the total of items 3, 5 and 6 from the subtotal	
	Total Score	

Scoring and what to do about it

15-30: Takes whatever comes, 30-45: Has vague idea, 45-60, Identified an intention, 60-65 Identified an intention and options

What to do? Contact us with your scores and let's explore the possibility that serves you best. You may consider purchasing Self-Coaching Guide, Individual, Couples, or Group Coaching or ask your employer to bring us in to conduct a group workshop at your organization. Contact us at 816-651-5900.

For more information, visit www.BOOMERangsRetirementCoach.com