

CELEBRATING MILESTONES & LIFE EVENTS

Honor Special Moments And Build A Life Worth Remembering

	YES	NO
1 Have you identified meaningful milestones you want to celebrate during retirement	<input type="checkbox"/>	<input type="checkbox"/>
2 Do you have a plan or budget in place for marking these life events?	<input type="checkbox"/>	<input type="checkbox"/>
3 Have you discussed your celebration goals or preferences with your spouse, partner, or family?	<input type="checkbox"/>	<input type="checkbox"/>
4 Do you take time to recognize personal achievements such as anniversaries, travel goals, or new hobbies?	<input type="checkbox"/>	<input type="checkbox"/>
5 Have you planned how you'd like to celebrate significant family events like graduations, weddings, or new births?	<input type="checkbox"/>	<input type="checkbox"/>
6 Do you intentionally create moments of joy around non-traditional milestones, such as personal growth or recovery?	<input type="checkbox"/>	<input type="checkbox"/>
7 Have you included celebratory events in your overall retirement lifestyle and financial plan?	<input type="checkbox"/>	<input type="checkbox"/>
8 Do you make time to reflect on past milestones as a way to inspire future ones?	<input type="checkbox"/>	<input type="checkbox"/>
9 Do you keep a calendar or list of important dates to help you stay proactive with celebrations?	<input type="checkbox"/>	<input type="checkbox"/>
10 Have you explored creative or meaningful ways to leave a legacy through milestone events?	<input type="checkbox"/>	<input type="checkbox"/>

QUESTIONS? CONTACT YOUR FINANCIAL ADVISOR



THE CENTER FOR
RETIREMENT READINESS

What Your Answers Might Mean:



7–10 Yes Answers: You Are Living Retirement With Purpose And Joy: You've thoughtfully built a retirement life that embraces meaningful celebration and lasting memories



4–6 Yes Answers: You're On The Right Path But Still Have Work To Do: You've taken steps to honor life's moments, but more planning will help you celebrate with consistency and meaning.



0–3 Yes Answers: You May Be At Risk And Need To Take Immediate Action: Without proactive planning, retirement milestones may go unrecognized—now is the time to shape a more intentional and fulfilling experience.