

CRAFTING YOUR BUCKET LIST

Organize Life Goals With Intention, Purpose, And Joy

		YES	NO
1	Have you written down a list of experiences or goals you want to achieve in retirement?	<input type="checkbox"/>	<input type="checkbox"/>
2	Have you organized your bucket list by themes such as adventure, personal growth, and giving back?	<input type="checkbox"/>	<input type="checkbox"/>
3	Do you regularly review and update your list based on evolving interests or values?	<input type="checkbox"/>	<input type="checkbox"/>
4	Have you included both big dreams and small, meaningful actions on your list?	<input type="checkbox"/>	<input type="checkbox"/>
5	Do you set realistic timelines or milestones for checking off items on your list?	<input type="checkbox"/>	<input type="checkbox"/>
6	Have you shared your bucket list with someone who can support or join you in fulfilling it?	<input type="checkbox"/>	<input type="checkbox"/>
7	Are there items on your list that involve learning something new or developing a skill?	<input type="checkbox"/>	<input type="checkbox"/>
8	Do you have experiences on your list that involve giving to others, volunteering, or mentoring?	<input type="checkbox"/>	<input type="checkbox"/>
9	Have you budgeted for or planned out how to fund specific bucket list goals?	<input type="checkbox"/>	<input type="checkbox"/>
10	Do you feel excited and motivated when you think about the possibilities on your list?	<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 Creating A Life Full Of Purpose And Passion: Your thoughtful and balanced approach to bucket-list planning is fueling your retirement with excitement, growth, and contribution.



4–6 Yes Answers: You're On The Right Path But Still Have Work To Do: You've started outlining your goals, and with more structure and follow-through, your list can guide you toward deeper fulfillment.



0–3 Yes Answers: You May Be At Risk And Need To Take Immediate Action: Without a clear vision, your dreams may remain unrealized—now is the time to define what matters and bring your list to life.