

CREATING TRADITIONS FOR YOUR RETIREMENT

Infuse Your Days With Meaning Through Personal Rituals

	YES	NO
1 Have you thought about which activities or rituals bring you a sense of joy, connection, or reflection?	<input type="checkbox"/>	<input type="checkbox"/>
2 Do you have any weekly or monthly routines that mark time in a meaningful way?	<input type="checkbox"/>	<input type="checkbox"/>
3 Have you established new holiday or seasonal traditions that reflect your retirement lifestyle?	<input type="checkbox"/>	<input type="checkbox"/>
4 Do you intentionally plan gatherings, meals, or outings that could become recurring touchpoints with family or friends?	<input type="checkbox"/>	<input type="checkbox"/>
5 Have you started any solo traditions, like morning walks, gratitude journaling, or Sunday breakfasts?	<input type="checkbox"/>	<input type="checkbox"/>
6 Do you involve loved ones in traditions that help maintain strong intergenerational bonds?	<input type="checkbox"/>	<input type="checkbox"/>
7 Have you identified values or themes (like learning, giving, or rest) you want your retirement traditions to reflect?	<input type="checkbox"/>	<input type="checkbox"/>
8 Do you feel a sense of comfort, purpose, or identity when you engage in familiar routines?	<input type="checkbox"/>	<input type="checkbox"/>
9 Have you documented or shared your new traditions with others so they can continue or participate?	<input type="checkbox"/>	<input type="checkbox"/>
10 Are you open to evolving or adapting traditions over time to keep them meaningful?	<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 With Intention And Joyful Rhythm: Your meaningful traditions are helping shape a retirement filled with connection, identity, and purpose.



4–6 Yes Answers: You're On The Right Path But Still Have Work To Do: You've begun cultivating traditions—now is the time to deepen their meaning and share them more fully with others.



0–3 Yes Answers: You May Be At Risk And Need To Take Immediate Action: Without rituals or routines, retirement can feel unanchored—now is the moment to create traditions that bring structure and soul to your days.