

HOSTING MEMORABLE GATHERINGS

Create Meaningful Moments That Bring People Together

		YES	NO
1	Do you enjoy planning events that reflect your personal style and values?	<input type="checkbox"/>	<input type="checkbox"/>
2	Have you identified the types of gatherings you most enjoy hosting (e.g., casual dinners, themed parties, milestone celebrations)?	<input type="checkbox"/>	<input type="checkbox"/>
3	Do you plan ahead to ensure gatherings are relaxed, organized, and enjoyable?	<input type="checkbox"/>	<input type="checkbox"/>
4	Have you considered the interests and comfort of your guests when designing your events?	<input type="checkbox"/>	<input type="checkbox"/>
5	Do you use storytelling, music, food, or decor to create a warm and memorable atmosphere?	<input type="checkbox"/>	<input type="checkbox"/>
6	Have you budgeted appropriately for celebrations without overextending your resources?	<input type="checkbox"/>	<input type="checkbox"/>
7	Do you find joy in creating space for connection, laughter, and shared memories?	<input type="checkbox"/>	<input type="checkbox"/>
8	Have you explored unique or creative ideas to make your events stand out?	<input type="checkbox"/>	<input type="checkbox"/>
9	Do you reflect afterward on what went well and what could be improved for future gatherings?	<input type="checkbox"/>	<input type="checkbox"/>
10	Have you considered how celebrations contribute to your legacy and strengthen relationships?	<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 Events That Foster Connection And Joy: Your thoughtful planning and intentional approach ensure your gatherings leave a lasting and positive impact on everyone involved.



4–6 Yes Answers: You're On The Right Path But Still Have Work To Do: You're building great celebrations, and with a few more touches of purpose and creativity, your gatherings can become even more meaningful.



0–3 Yes Answers: You May Be At Risk And Need To Take Immediate Action: Without planning and intention, opportunities for meaningful connection may be lost—now is the time to create gatherings that reflect your heart and bring people closer together.