

PLANNING THEMED RETIREMENT YEARS

Infuse Each Year With Purpose, Adventure, And Renewal

	YES	NO
1 Have you considered creating themed years in retirement to focus on specific dreams or interests?	<input type="checkbox"/>	<input type="checkbox"/>
2 Do you have a list of experiences, goals, or passions you'd like to dedicate a year to exploring?	<input type="checkbox"/>	<input type="checkbox"/>
3 Have you budgeted for a themed year such as travel, wellness, creativity, or learning?	<input type="checkbox"/>	<input type="checkbox"/>
4 Do you have a clear idea of what success or fulfillment would look like for your chosen theme?	<input type="checkbox"/>	<input type="checkbox"/>
5 Have you shared your themed-year ideas with a partner, friend, or advisor for feedback and support?	<input type="checkbox"/>	<input type="checkbox"/>
6 Do you have the flexibility and freedom in your schedule to commit to a focused year?	<input type="checkbox"/>	<input type="checkbox"/>
7 Have you researched logistics such as health considerations, transportation, or scheduling?	<input type="checkbox"/>	<input type="checkbox"/>
8 Are you open to adjusting your lifestyle or routines to fully engage with your chosen theme?	<input type="checkbox"/>	<input type="checkbox"/>
9 Do you have a plan to document, reflect on, or share your themed-year experience?	<input type="checkbox"/>	<input type="checkbox"/>
10 Are you already thinking about future themes that align with your evolving retirement goals?	<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 Ready To Create A Purposeful And Inspired Year: You've laid the groundwork for a themed retirement year that can bring structure, meaning, and joy to your next chapter.



4–6 Yes Answers: You're On The Right Path But Still Have Work To Do: You have the vision, but more clarity and planning will help you fully commit to and enjoy your chosen focus.



0–3 Yes Answers: You May Be At Risk And Need To Take Immediate Action: Without intention, your retirement years may drift—now is the time to shape your time around what truly excites and fulfills you.