

Help your clients & prospects create their retirement visions by asking the right questions

- What does your ideal retirement look like?
- Who does your retirement include? What provisions are needed for those people and/or pets?
- What activities and hobbies do you envision being a part of your retirement?
- Do you plan to travel extensively, or would you prefer a more relaxed lifestyle close to home?
- Are there specific milestones or experiences you want to achieve during your retirement?
- At what age do you envision retiring?
- Do you foresee a phased or gradual retirement, or a more traditional retirement with a sudden exit from full-time work?
- How do you anticipate your expenses changing in retirement (e.g., healthcare, travel, housing)?
- Have you considered potential healthcare costs in your retirement plan?
- What outstanding debts do you have, and how do you plan to manage them in retirement?
- Do you have a mortgage or other significant loans that need to be considered in your retirement plan?
- How is your current health, and do you anticipate any significant health-related expenses in retirement?