

QUALITY OF LIFE WORKSHEET

Three questions that predict your future quality of life

When you consider retirement planning, it's easy to lose sight of the forest for the trees. The first thing that comes to mind is probably, "How much money will I need?" But whatever that amount may be, your finances are only part of the equation for a meaningful retirement. What may be more important is identifying the factors that will determine your future quality of life. The following three questions are a great place to start creating a broader, more holistic approach to living longer and living well.



Who will change my light bulbs?

How will you continue living in your home safely and independently? Identify the costs as well as the trusted service providers necessary to maintain your home in the future.

Activity	Service Provider	Cost (monthly)
House cleaning		
Maintenance and basic repairs		
Lawn care		
Grocery delivery		
Laundry		
Home modifications		
Other		
Other		
Other		
Total		



How will I get an ice cream cone?

What do you like to do? Will you have adequate transportation to go where you want—when you want—in the future? Consider whether you'll get there by car, public transportation, or even fly.

List examples in each category.



Hobbies



Travel



Volunteer



Time with Family



Home Improvement



Other



Who will I have lunch with?

Who are your closest friends and mentors? Who adds special value or has a specific role in your life? Who will you continue to depend on for advice or enjoying shared experiences?

List those connections here.

Name:

1.

2.

3.

4.

5.

How/why I depend on them:

1.

2.

3.

4.

5.

To age well, you need to engage well. Here are some ways people create and maintain strong social networks. Choose items that may satisfy your interests.

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|---|--|
| <input checked="" type="checkbox"/> <input type="checkbox"/> Attend a senior center | <input checked="" type="checkbox"/> <input type="checkbox"/> Use online social networking to meet other retirees |
| <input checked="" type="checkbox"/> <input type="checkbox"/> Do volunteer work | <input checked="" type="checkbox"/> <input type="checkbox"/> Join a travel club |
| <input checked="" type="checkbox"/> <input type="checkbox"/> Enroll in a college course | <input checked="" type="checkbox"/> <input type="checkbox"/> Enroll in an exercise class |
| <input checked="" type="checkbox"/> <input type="checkbox"/> Frequent your neighborhood coffee shop | <input checked="" type="checkbox"/> <input type="checkbox"/> Ask family and friends to introduce you to others |

Talk to your Raymond James financial advisor for help planning for a happy, healthy retirement.

☒ ☐ Appointment date and time:
