











The Elements of Retirement

Self-Assessment Rating Worksheet

Instructions:

1. For each element, rate your current level of satisfaction on a scale of 0 (low) to 10 (high).
2. For each element, set a goal level of satisfaction within 1 year on a scale of 0 (low) to 10 (high).
3. On page 2, plot both answers along the dotted line in each element (bullseye = 0, outer rim = 10).
4. Connect the plotted dots to complete your retirement life “wheel” for both current and 1 yr goal.

Element	Examples	Current (0-10)	1 YR Goal (0-10)	Gap
 Work	Work in retirement, Part-time work, Volunteering, Starting a Business, Board work, etc.			
 Health	Fitness, Nutrition, Wellness, Health Insurance, Medicare, etc.			
 Family	Marriage, Relationships with children, grandchildren, aging parents, extended family, etc.			
 Home	Where you live, what you live in, Second home, etc.			
 Growth	Continued education, personal growth, adventures, fulfillment, goals, productivity, etc.			
 Leisure	Travel, hobbies, recreation, entertainment, sports, etc.			
 Social	Personal, non-family relationships, networking, community engagement, etc.			
 Giving	Giving time, talent and treasure to charitable organizations. Giving to family and others.			
 Money	Cash flow management, taxes, risk management, overall financial plan, etc.			
 Aging	Long-term care, estate planning, aging in place, legacy & family communications, etc.			

The Elements of Retirement *Self-Assessment Diagram*

