

DEFINE YOUR RETIREMENT WORKSHEET



VOSBERG WEALTH
MANAGEMENT

www.VosbergWealth.com | 626.358.5458

Name: _____

Date: _____

As you plan for retirement, take time to reflect on the following questions that will shape your retirement lifestyle. What brings you joy – travel, hobbies or spending time with loved ones? Envision your ideal day and the passions you've always wanted to pursue. By answering these questions, you'll clarify your aspirations and create a fulfilling retirement that resonates with your true self, transforming this next chapter into a vibrant continuation of your story.

What does retirement mean to you?

How do you want to spend your time?

Do you plan to work during retirement? If so, what kind of work do you want to do? Do you want to explore a new occupation?

Do you plan to volunteer during retirement? If so, what organizations?

What hobbies or interests do you want to explore?

How much time do you wish to spend with family?

Are you interested in traveling? If so, where do you want to travel?

What are things that you would like to do in retirement that you could not do while you were working?

Could you retire today if finances allowed?

Describe your perfect day in retirement.

- What are you doing in the mornings?

- What are you doing in the afternoon?

- What are you doing in the evenings?

- Who are you doing this with (spouse, friends, family)?



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