

## Working it out

## Retirement WORKsheet

Look at the following list of Reasons for Working and rank them 1-5 (with 1 being the lowest and 5 being the highest) in order of importance to you.

1.	Intellectual stimulation	1	2	3	4	5
2.	To stay healthy	1	2	3	4	5
3.	Social engagement	1	2	3	4	5
4.	Enjoyment of competing	1	2	3	4	5
5.	Fear of boredom	1	2	3	4	5
6.	Growth and learning	1	2	3	4	5
7.	Making an impact	1	2	3	4	5
8.	Sense of relevance	1	2	3	4	5
9.	Identity tied to my work	1	2	3	4	5
10.	Talents and abilities are expressed through my work	1	2	3	4	5
11.	Maintaining my lifestyle	1	2	3	4	5
12.	Employer-sponsored benefits package	1	2	3	4	5
13.	Money for extras	1	2	3	4	5
14.	Can't afford to quit	1	2	3	4	5
15.	Concerned about Social Security earnings restrictions	1	2	3	4	5
16.	Would like to have more savings	1	2	3	4	5
17.	Would like to pay down debt	1	2	3	4	5
18.	Want to avoid drawing down assets	1	2	3	4	5
19.	Have more to leave for heirs	1	2	3	4	5
20.	Concerns about rising costs of living	1	2	3	4	5

Existential Motivators: Add your total from numbers 1-10 = \_\_\_\_\_

Economic Motivators: Add your total from numbers 11-20 = \_\_\_\_

	0	10	15	20	25	30	35	40	45	50
Existential Motivators										
Economic Motivators	>									