



Vanguard[®]

Focus on retirement

What's your vision?

You've spent years saving for retirement. But now that you're getting closer to that time, can you see how your life will look once you're there? To help answer the question and clarify your vision, complete this worksheet. Have your spouse complete it, too, and compare your visions.

1. When do you think you'd like to retire?

2. Are you likely to continue working part time? If so, what do you see yourself doing?

3. How much structure do you see your day having during retirement?

4. Who are the people you expect to be spending time with during retirement?

5. Do you anticipate providing financial support to family members other than your spouse (if you're married)?

6. Do you plan to relocate? If so, when do you anticipate doing it and where?

(over)

7. Do you expect to travel more than you do now? If so, where do you see yourself going?

8. Do you expect to pursue any hobbies or other endeavors? If so, list them here.

9. Do you want to support a charitable organization? If so, will it be through financial contributions, volunteer time, or both?

10. Do you have any health conditions that could affect your expenses?

11. What type of legacy have you considered leaving for family members or charitable organizations?

12. Do you see your lifestyle changing after five years in retirement? After ten years? If so, how?