



Edwin W. Smith, CLC  
"Coach Win"

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## Coach Win's Retirement Readiness Questionnaire

Everyone has a financial portfolio, although the value of each financial portfolio varies greatly depending on someone's savings, the amount of monthly Social Security retirement benefits, real estate equity, stocks owned, any available pension or 401(k), etc., etc. However, having a financial portfolio regardless of its value, is not enough to get the most out of your retirement years because it ignores the physical, sociological, and psychological aspects of life!

I believe that everyone also needs to create a non-financial portfolio which I like to call a Psycho-Social portfolio, sometimes called a Happiness portfolio. Your non-financial portfolio should consist of your core values, your gifts and talents, your mission and vision statements, your life purpose, and other lifestyle issues. Last, but not least, it needs to address your health and fitness. After all, you won't be able to enjoy the rest of your life and that financial portfolio you worked so hard to build over time, if you don't have your health. Your health is your real wealth and not the value of your financial portfolio.

I created **this Retirement Readiness Questionnaire** to give you a preview of some of the non-financial issues you are likely to encounter after leaving the workplace. If you are married or have a significant other, you might want to separately complete this questionnaire before coming together to jointly discuss your respective responses and, if indicated, compromise on differing perspectives.

If you are the independent type who prefers to do things on your own, **My Retirement Toolkit** ([available here](#)) is the perfect solution. However, if you prefer the help of a professional retirement coach, email me at [coachwin@outlook.com](mailto:coachwin@outlook.com) to schedule a free strategy call.

Do you have a strategy to replace your professional or work identity with purposeful retirement activities?

Yes       No

If applicable, have you researched how your health and life insurance coverages will change after retirement?

Yes       No



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Have you or your financial planner discussed how your spending habits may need to change after retirement?

Yes       No

Have you identified the gifts, skills, and abilities you possess that you may be able to put to good use in retirement?

Yes       No

Are you concerned about maintaining your sense of purpose and self-worth after leaving full-time employment?

Yes       No

Do you have any concerns about you and/or your significant other being able to adjust to a post-employment lifestyle?

Yes       No

Since change is constant and unpredictable, will you be able to adapt to the changes you will inevitably encounter in retirement?

Yes       No



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Have you researched or do you know how to may want to respond to ageism and stereotypes about older workers?

Yes       No

Have you given serious thought to development of a new life purpose, or the reason(s) that will get up and out of bed each morning?

Yes       No

Have you developed a Personal Mission Statement and Personal Vision Statement to guide you in your retirement decisions and activities?

Yes       No

Do you have a desire to share your talents and to give back to your community and others?

Yes       No

Are you willing to embrace a life-long learning stance or acquire new skills to remain relevant?

Yes       No



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Are you content with the personal or financial legacy you will leave behind some day?

Yes       No

Do you have a process or strategy to set and achieve any new post-retirement goals?

Yes       No

Have you considered developing a post-retirement roadmap and associated plan of action?

Yes       No

This **Retirement Readiness Questionnaire** should have given you plenty of “food for thought.” There really is a lot that goes into development of your non-financial portfolio which will become the perfect complement to your financial portfolio. Based on my personal experience, my research, and my retirement coaching work, it is the **only** way to ensure you’re able to live the best rest of your life! Good luck to you!

*Coach Win*

[Click here for your FREE One-Year Personal Retirement Planner](#)