

Retirement Exploration Questionnaire

Define your vision



The financial crisis has left many investors with tough decisions to make about their future. As a first step towards creating a new financial strategy, re-evaluate your retirement goals to understand what is most important to you.

Learning what retirement means to you

- Imagine you have already stopped working. Picture yourself at a party and another guest asks you what you do. How would you *like* to reply?
- Fill in the missing blank: The prospect of retiring makes me feel (*tell us*) _____
- Who are your retirement role models (parents, grandparents)? Do you want to follow their example?
- What will you be wearing in retirement? A swim suit? A business suit? A ski suit? (*tell us*) _____
- Which of the following steps would you like to take in the next year to prepare you for what's next?
 - Learn all I can about making the most of the next life stage
 - Talk with my spouse/partner about what each of us wants out of life
 - Explore how other people are planning for the next life stage
 - Take some educational or self-enrichment classes
 - Explore passions and priorities I postponed
 - Research potential relocation communities
 - Other (*tell us*) _____

Define your vision (continued)

Thinking through your priorities

Rank the following important challenges as you look toward the next stage of your life
(1= most important; 5 = least important)

_____ Identifying my passions	_____ Deciding when or whether to retire
_____ Managing and understanding my finances	_____ Finding a post-retirement career
_____ Other (tell us) _____	

Determine the essentials

With a clearer vision of the next life stage, you can then begin focusing on the specifics.

- Do you plan to work? Yes No
- Do you have adequate healthcare coverage? Yes No
- Do you anticipate having to care for children/parents in retirement? Yes No
- Will you make any charitable bequests in retirement? Yes No
- What age are you planning on taking your Social Security? _____
- What age do you expect to begin the next phase? _____

Which activities, hobbies and interests will take **more, less,** or the **same** amount of your time in retirement?

Activities/Hobbies	More	Less	Same
Dining Out	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entertaining Friends	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exercise/Fitness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
House/Yard Work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personal Care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Preparing Meals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Next steps

The better we understand how you envision your future, the better we can help you shape it. To learn more about how we can help you plan for retirement, speak to a UBS Financial Advisor. To find a Financial Advisor in your area, go to www.ubs.com/financialservicesinc.

Neither UBS Financial Services Inc. nor its employees provide tax or legal advice. You must consult with your attorney and tax advisors regarding your personal circumstances.

Depending on your needs, we can help you implement your retirement strategies through both our advisory and brokerage capabilities.
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090209-0374-026

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