RETIREMENT READINESS SCORECARD

To help us more clearly understand your current situation, fill out the **Retirement Readiness Scorecard.** Rate your reactions to each phrase on a scale from 1 to 10 with 10 being the highest. Add up your total from each column so that we can evaluate your concerns.

	STRONG DISAGREE									STONGLY AGREE
I feel I have protected what I've worked so hard to save	1	2	3	4	5	6	7	8	9	10
I am confident about my long-term financial security	1	2	3	4	5	6	7	8	9	10
I feel I am protected against the impact that repeated significant market declines would have on my portfolio	1	2	3	4	5	6	7	8	9	10
I have developed a detailed retirement game plan, taking all factors into consideration	1	2	3	4	5	6	7	8	9	10
I feel I am protected against the impact a long-term care event would have on my retirement	1	2	3	4	5	6	7	8	9	10
I fully understand how Required Minimum Distributions (RMDs) impact my retirement plan	1	2	3	4	5	6	7	8	9	10
I feel I am fully informed on Medicare planning	1	2	3	4	5	6	7	8	9	10
I feel my basic estate documents are in good order (wills, health care directives, etc)	1	2	3	4	5	6	7	8	9	10
I feel I am getting excellent advice from my current financial advisor on how to retire with confidence, protect my assets and reduce the impact of taxes and health care costs	1	2	3	4	5	6	7	8	9	10
I feel that I do not need to make any changes to my current portfolio to provide additional safety	1	2	3	4	5	6	7	8	9	10
ADD COLUMN TOTALS										