



# RetirementSure

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Protect Your Retirement Savings

## FINANCIAL PERSONALITY WORKSHEET

This questionnaire is designed to help you identify your financial personality as it relates to retirement planning. Understanding your general concerns will help your financial professional develop a personalized long-term retirement strategy that may be more suitable for your needs. Please take your time to carefully consider and answer the following questions.

Circle your response to each statement. Note how many points each response is worth. Then, total your points for all eight questions and use the chart below to determine your financial personality.

Strongly agree 5 points	Somewhat agree 4 points	Neutral 3 points	Somewhat disagree 2 points	Strongly disagree 1 point	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____ points
In terms of my finances, I feel fully prepared for retirement.					
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____ points
I am 100% certain that my sources of income will last my entire lifetime.					
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____ points
I don't worry about outliving my income in retirement.					
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____ points
The idea of providing for myself and my family in retirement is not overwhelming.					
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____ points
I feel confident that I will be able to retire, and I know approximately when that will be.					
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____ points
I will be able to maintain my desired lifestyle in retirement.					
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____ points
I am comfortable paying my bills, and am planning for retirement.					
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____ points
I am comfortable taking some financial risks because I can afford to.					
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____ points

### What's your financial personality?

- Savvy 38-40 points
- Iconic 28-37 points
- Resilient 20-27 points
- Distracted 11-19 points
- Overwhelmed 8-10 points

Total points \_\_\_\_\_

RESET

SUBMIT