

# Money for Life

BUILD. PROTECT. RETIRE WITH CONFIDENCE.

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RETIREMENT LIFESTYLE QUIZ



Life's brighter under the sun



# RETIREMENT LIFESTYLE QUIZ

Retirement is a major life event, meaning different things to everyone. Talking to your advisor about lifestyle needs in retirement is part of **Money for Life** – Sun Life Financial’s customized approach to financial and retirement planning.\* Complete this 12-question quiz to help you and your advisor start the conversation about your lifestyle vision in retirement. If you have a spouse or partner, please answer the quiz separately, and then compare your results. This will help you plan for the retirement lifestyle you both really want!

**1. When it comes to your lifestyle in retirement, what’s most important to you?**

Travelling

Volunteering

Working part-time

Relaxing at home

Enjoying an active lifestyle

Spending time with family and friends

Other \_\_\_\_\_

**2. When it comes to entertainment, how do you foresee spending your time? (Select all that apply)**

Going out for dinner and movies

Season tickets to theatre or sporting events

Private club membership for golf, tennis, curling, etc.

Backyard BBQs

Spending time at the cottage or vacation home

Other \_\_\_\_\_

**3. Do you enjoy spending time outdoors?**

Yes, I enjoy being active outdoors

Yes, when I’m gardening

Only when I’m relaxing on my boat or at the beach

I prefer the indoor comforts of air conditioning and heating

**4. Where do you plan on living in retirement?**

Stay in my current home

Move to another city (to be closer to friends/family)

Downsize and move to a smaller home

Move to a warm location during the winter months

**5. Are you on the same page about your lifestyle vision in retirement as your life partner?**

Yes, we're on the same page

No, we have different ideas about this

Not sure – we'll need to talk more

I'm single

**6. What's your biggest financial worry in retirement?**

Outliving my money

Inflation reducing my purchasing power

Poor market returns impacting my income

My spouse or I becoming ill in retirement

No worries

**7. What's your biggest emotional worry in retirement?**

Missing the social interaction I had at work and being lonely

Spending significantly more time with my spouse/partner/family

Losing part of the identity that came with my job

Being bored and feeling like I have no purpose

No worries

**8. Do you think you've saved enough to live the retirement lifestyle you want to live?**

Yes, I'll be able to retire comfortably

I'm confident I'll be able to pay for my basic expenses

No, I need to be saving more

I'm not sure how much I need

**9. Plenty of retirement clichés exist out there. Which of the following could you actually see yourself doing? (Select all that apply)**

Spending lots of time on the golf course

Boating

Heading south for the winter

Mountain climbing

None of the above

10. Do you want to continue your education in retirement?

No, my school days are behind me

Yes, I'm going for that degree I didn't have time to pursue earlier

Maybe I'll learn something new (e.g. ballroom dancing or woodworking)

Maybe I'll teach a class

11. Which of the following best describes your wishes about leaving an inheritance?

I want to leave as much as possible and I'm willing to sacrifice some of my "wants and dreams" in retirement

I want to leave enough money to ensure my family is taken care of and is comfortable

I want to leave enough money to cover my final expenses and anything else is a bonus

I want to accomplish as many of my retirement dreams as possible and if there is any money left, it can go to my family

12. What kind of afternoon activity sounds most appealing to you? (Select all that apply)

Hearing a noted speaker discuss current events

Visiting a museum or cultural exhibit

Strolling the boardwalk

Bird watching on the back porch

Entertaining family and/or friends

Other \_\_\_\_\_

If you have a spouse, compare your results after taking the quiz. Bring your completed quiz to your next advisor meeting to start the conversation.

**Plan for the retirement lifestyle you really want – and can enjoy – with Money for Life.**

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**MONEY FOR LIFE TODAY.**

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achieve a lifetime of financial security.

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Confidence

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