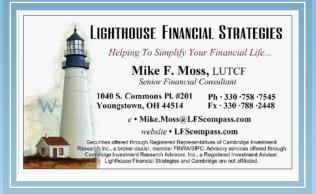
Retirement Planning Self Assessment

Assessing your feelings about retirement will go a long way toward achieving your goals.

| Please respond to each statement by indicating your degree of agreement or disagreement. | Strongly Agree | Somewhat Agree | Not Sure | Somewhat Disagree | Strongly Disagree |
|-----------------------------------------------------------------------------------------------------|-------------------|-------------------|-------------|----------------------|----------------------|
| I expect to outlive my average life expectancy by a number of years. | | | | | |
| I want to take full advantage of the early years of retirement to live life to the fullest. | | | | | |
| I believe I will collect most of the Social Security benefits that I am owed. | | | | | |
| I don't want to spend all the money I have on my retirement; I want to leave something to my heirs. | | | | | |
| I am concerned about living alone at older ages. | | | | | |
| I like the idea of working part-time in retirement in a job or field that I might enjoy. | | | | | |
| I want the early years of my retirement to be relaxed and worry-free. | | | | | |
| Health issues may determine how I approach retirement planning. | | | | | |
| I worry a lot about the possibility that my assets or income might run out in retirement. | | | | | |
| I worry about the impact of inflation on my retirement. | | | | | |
| I worry that I will make big mistakes in important decisions, such as a rollover. | | | | | |
| After retirement starts, I should preserve my assets by not taking much investment risk. | | | | | |
| I worry about paying for health care costs in retirement. | | | | | |
| I expect to live in a different house or community during most of retirement than where I live now. | | | | | |





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