

Interview Guide

If someone in your social network is retired, he or she may be one of the best sources of information to help you clarify your retirement vision and plan ahead for retirement. Ask your retired friends and neighbors these questions to benefit from real-life experience and note their insights.

1 How did you transition from full-time work to retirement?

2 How much planning did you do, and how far in advance did you start?

3 What were your specific planning steps and actions? Which ones were successful? Which ones were not useful?

4 How is retirement different from what you expected?

5 How did retirement affect your social life?

6 Did you think about moving closer to family members?

7 Are you doing today what you envisioned you would be doing?
What were your goals (i.e., travel, hobbies) and did you fulfill them?

8 What one thing would you do differently to prepare for retirement if you were doing it over?

Refining Your Retirement Vision

Write down your answers to these questions so that you will have key information to help you clarify your retirement dream.

1 Where will I live? Do I want to move? Why?

2 What will I do? Work part-time? Volunteer?

3 Will I want to travel? Where? Costs?

4 How will I stay active and healthy?

5 How will my social life change?

6 Do I have a handle on what my income and expenses will be in retirement?

