

Retirement Life Values, Interests and Preferences

Read the following list of life values, interests and preferences. Assign a value of importance to each one on a scale of 1 to 5; 1 is the least important and 5 is the most important to you. Do you see a pattern to your answers? What steps are you taking to attain these objectives? How do your interests, values and preferences rank with those of your spouse or partner? Are they compatible?

	You	Your Spouse
Employer's pension plan	_____	_____
Achievement (sense of accomplishment)	_____	_____
Adventure (risks, excitement, exploration)	_____	_____
Affection (giving and receiving love, warmth, caring)	_____	_____
Emotional health (ability to handle internal and external conflict)	_____	_____
Expertness (being good at something important to you)	_____	_____
Family harmony (respect, affection and sharing)	_____	_____
Financial independence (sufficient money for things you need and want)	_____	_____
Honesty and candor (being frank and genuinely yourself)	_____	_____
Leadership (having influence and authority)	_____	_____
Meaningful work (relevant and purposeful job)	_____	_____
Personal freedom (independence, making your own choices)	_____	_____
Physical health (feeling of well-being and vitality)	_____	_____
Pleasure (satisfaction, enjoyment, fun)	_____	_____
Recognition (being well-known, respect, prestige)	_____	_____
Security (having a stable and secure future)	_____	_____
Self-Growth (continuing development and exploration)	_____	_____
Service (contribute to needs of others)	_____	_____

	You	Your Spouse
Spirituality (religious beliefs, meaning of life)	_____	_____
Wisdom (insight, mature understanding)	_____	_____
Work (paying your own way)	_____	_____
Other (Specify)		
_____	_____	_____
_____	_____	_____
_____	_____	_____