

Financial *Life* Planning

Maslow
Meets
Retirement

INCOME FOR LIFE
WORKBOOK

Discovery Worksheet

I am more concerned about outliving my income than I am about asset growth.

- True
 False
 Equally Concerned

I will always be concerned that I will not have enough money to fund my retirement.

- True
 False
 I would not have this concern if I had \$_____

My feelings about paying taxes:

- I look at taxes as a necessary patriotic act of which I am proud to pay.
 I do not like paying taxes but realize that they are necessary — so I do my part.
 I hate taxes and will do anything within the law to avoid paying them.

How I feel about earning income while in retirement:

How I feel about funding my children's education:

How I feel about taking care of my aging parents:

How I feel about giving money to people and causes that are meaningful to me:

How I feel about leaving money to my children / grandchildren:

"Maslow Meets Retirement"

- Survival Income** *Money that I have to have to make ends meet.*
- Safety Income** *Money that I must have to meet life's unexpected turns.*
- Freedom Income** *Money to do all of the things that bring enjoyment and fulfillment to my life.*
- Gift Income** *Money for the people and causes that I care about.*
- Dream Income** *Money for the things I've always dreamed of having and doing.*