

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:**

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**How I feel about funding my children's education:**

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**How I feel about taking care of my aging parents:**

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

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

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**"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.*