



WELLNESS WORKSHEET 104

The Eight Dimensions of Successful Retirement Self-Assessment

Throughout our lives we have passed through many stages of development and change. This self-assessment has been created to help you explore and reflect upon eight life dimensions that are related to a successful retirement. There are no right or wrong answers.

Instructions: Review each item within each of the Eight Dimensions and circle the number, from 0 (lowest) to 5 (highest), that best reflects your current level of satisfaction with that item.

A comments section has been included with each dimension for you to include additional thoughts and reflections after you have completed the exercise.

Dimension 1 : Self-Discovery & Renewal

- | | | | | | | |
|--|---|---|---|---|---|---|
| 1. Level of spirituality | 0 | 1 | 2 | 3 | 4 | 5 |
| 2. Commitment to personal core values | 0 | 1 | 2 | 3 | 4 | 5 |
| 3. Self-maintenance and development activities | 0 | 1 | 2 | 3 | 4 | 5 |
| 4. Personal focus and search for meaning | 0 | 1 | 2 | 3 | 4 | 5 |
| 5. Development of new skills and interests | 0 | 1 | 2 | 3 | 4 | 5 |

Comments: _____

Dimension 2: Financial & Legal Stewardship

- | | | | | | | |
|---|---|---|---|---|---|---|
| 1. Current financial resources | 0 | 1 | 2 | 3 | 4 | 5 |
| 2. Future financial resources | 0 | 1 | 2 | 3 | 4 | 5 |
| 3. Financial planning, goals and objectives | 0 | 1 | 2 | 3 | 4 | 5 |
| 4. Relationship of other goals with financial resources | 0 | 1 | 2 | 3 | 4 | 5 |
| 5. Asset and health care protection | 0 | 1 | 2 | 3 | 4 | 5 |

Comments: _____

(over)

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Dimension 3: Health & Wellness

1. Diet and nutrition	0	1	2	3	4	5
2. Level of exercise/physical activity	0	1	2	3	4	5
3. Health appraisal	0	1	2	3	4	5
4. Goals and objectives	0	1	2	3	4	5
5. Factors affecting health (smoking, alcohol, drugs, etc.)	0	1	2	3	4	5

Comments: _____

Dimension 4: Meaning & Purpose—Continuing to Contribute

1. Volunteer activities	0	1	2	3	4	5
2. Working—full or part time	0	1	2	3	4	5
3. Service organization involvement	0	1	2	3	4	5
4. Family support and involvement	0	1	2	3	4	5
5. Feeling of meaning and purpose	0	1	2	3	4	5

Comments: _____

Dimension 5: Staying Sharp—Mental Fitness

1. Continuing to learn	0	1	2	3	4	5
2. Self-esteem	0	1	2	3	4	5
3. Exploring new opportunities	0	1	2	3	4	5
4. Future outlook	0	1	2	3	4	5
5. Personal goals and objectives	0	1	2	3	4	5

Comments: _____

(over)

Dimension 6: Relationships

1. Quality of interactions with family members	0	1	2	3	4	5
2. Quantity of interactions with family members	0	1	2	3	4	5
3. Quality of interactions with others	0	1	2	3	4	5
4. Quantity of interactions with others	0	1	2	3	4	5
5. Connections with other groups	0	1	2	3	4	5

Comments: _____

Dimension 7: Peak Experiences

1. Hobbies	0	1	2	3	4	5
2. Travel	0	1	2	3	4	5
3. Sports and related activities	0	1	2	3	4	5
4. Cultural activities	0	1	2	3	4	5
5. Clubs, associations, group membership	0	1	2	3	4	5

Comments: _____

Dimension 8: Home Base

1. Geographical preference	0	1	2	3	4	5
2. Suitability/type of residence	0	1	2	3	4	5
3. Access to resources and activities	0	1	2	3	4	5
4. Climate	0	1	2	3	4	5
5. Congruity with financial resources	0	1	2	3	4	5

Comments: _____

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Scoring Instructions:

1. Add your “scores” for each item within each dimension to get a total score for that dimension. Record your score for each dimension below.
2. Divide that total by 5 to get an average score for the dimension.
3. List the average score for each dimension in the chart below.

Dimension	Total Score	Avg. Score (Total ÷ 5)
1. Self-Discovery & Renewal	_____	_____
2. Financial & Legal Stewardship	_____	_____
3. Health & Wellness	_____	_____
4. Continuing to Contribute	_____	_____
5. Mental Fitness	_____	_____
6. Relationships	_____	_____
7. Peak Experiences	_____	_____
8. Home Base	_____	_____

4. Plot your Average Satisfaction Scores on the following line chart.

5								
4								
3								
2								
1								
	D-1	D-2	D-3	D-4	D-5	D-6	D-7	D-8

5. Connect the dots with straight lines to complete your line chart.