



# Life & Financial Goals

## Bringing Them Together

Your retirement should be more than just financially secure. It should be fulfilling.

In fact, the two go hand in hand. Financial security in retirement gives you peace of mind that lets you pursue what really matters in your life. Likewise, your life goals influence how much you'll need to finance retirement.

We often talk with you about your financial goals. But we know that achieving life goals is just as important. We're interested in helping you develop the same confidence in your life goals as you have in your retirement finances.

Focusing too much on finances and not enough on a fulfilling retirement can lead to regrets. A recent study by a U.S. financial institution showed that half of its affluent clients wished they had focused more on their life goals, rather than their financial goals. In our view, the key to retirement success is combining these two important approaches to retirement.

Together, we're already well-focused on financial goals, so let's spend some more time on life planning.

What do you really want to do in retirement? Travel, spend more time with your family, volunteer, work for social causes? Remember, your goals must satisfy you throughout a long retirement, not just a few months. Short-term goals such as "play more golf," or "read more" are important, but let's reach beyond those to discover what will happily take you through 20, 30, or more years of retirement.

Let's discuss what matters in your life and what will provide you with a sense of fulfillment and achievement in retirement.

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