



Federal Employee Retirement Preparedness Diagnostic

This self-assessment tool helps you to identify possible areas of concern in your retirement planning. Indicate the degree to which you *agree* or *disagree* with the statements below. Once you are finished, total your score.

	Disagree										Agree	Score
1. I have a documented methodology to calculate my HI-3 Average Pay that is consistent from year to year.	1	2	3	4	5	6	7	8	9	10	<input type="text"/>	
2. My Creditable Civilian Service documentation is audited for accuracy and completeness.	1	2	3	4	5	6	7	8	9	10	<input type="text"/>	
3. My Pension Analysis system accurately forecasts my future pension income based upon my expected retirement date.	1	2	3	4	5	6	7	8	9	10	<input type="text"/>	
4. I have implemented an effective strategy to close my Pension "Gap" and monitor my progress annually.	1	2	3	4	5	6	7	8	9	10	<input type="text"/>	
5. I have defined, documented investment guidelines to use when selecting my investments.	1	2	3	4	5	6	7	8	9	10	<input type="text"/>	
6. I have a planned, ongoing strategy to help reduce damaging effects of taxes and inflation on my investments.	1	2	3	4	5	6	7	8	9	10	<input type="text"/>	
7. I have an efficient method to measure and monitor my investment results every 90 days.	1	2	3	4	5	6	7	8	9	10	<input type="text"/>	
8. I have a defined, documented system to help reduce my retirement accounts' exposure to an unknown future tax rate.	1	2	3	4	5	6	7	8	9	10	<input type="text"/>	
9. All parts of my long-term care plans are well-defined and carefully organized in order to minimize disruption in my loved ones' daily lives.	1	2	3	4	5	6	7	8	9	10	<input type="text"/>	
10. All parts of my Federal Employee Benefits are well-coordinated and nothing important will be overlooked.	1	2	3	4	5	6	7	8	9	10	<input type="text"/>	

Securities and investment advisory services offered through H. Beck, Inc. Member FINRA/SIPC. H. Beck, Inc. and Brokers International Mountain States are unaffiliated.

TOTAL SCORE

Notes:

Name: _____

Phone Number: _____

(Use back of page if necessary)