

RESOURCES

Individual Interviews Resources (1 of 2)

Tips for Individual Interviews

- Arrange to hold interviews in a comfortable, neutral location
- Keep interviews short: 30 minutes or less
- Make eye contact, smile and relax to put employees at ease
- One interviewer per session is best; two at most
- Allow people to answer fully, avoiding finishing their sentences (or doing other things we naturally do in conversation to "help")

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Individual Interviews Resources (2 of 2)

Questions for Individual Interviews

1. What would you like to do after you retire?
2. Do you like to think about retirement?
3. Tell me about your parents. Are your father and mother retired? (If both deceased, then ask if they retired before dying.)
4. Let 's discuss retirement planning. Which of the following apply to you?
Please listen to all four:
 - a) I am not doing any planning for retirement
 - b) I have thought about it but I have not done anything yet
 - c) I have taken some initial steps
 - d) I have been doing retirement planning for the last couple of years or longer
5. Do you know anyone who has done a really good job or a really bad job in planning for retirement? Can you describe his/her/their story to me?
6. Have you thought at all about medical expenses after retirement?
7. Which sources of information do you use in making your financial decisions?
8. Let 's turn now to saving. Does your household save/ put money aside?
9. How have various events in your life impacted your ideas and actions about saving?
10. Let 's talk about your family situation
 - a) Are you married, what is your current marital status?
 - b) Do you have children (and yes, how many and of which age)
 - c) Do you have aging parents/parents-in-law you have to take care of?
 - d) How much control do you feel you have in your family spending patterns?
 - e) Would you like to have information say on things like how to budget, how to speak to kids about expenses, how to be a role model?
11. If you could pick two things that can help you in your financial decision making, what would you say?