



FINDING YOUR PATH IN RETIREMENT

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SUCCESSFUL – UNSUCCESSFUL RETIREMENT

Think of an individual or couple whom you feel has made a successful transition to retirement.

- Why was it successful?

Think of an individual or couple whom you feel has not made a successful transition to retirement.

- Why was it unsuccessful?



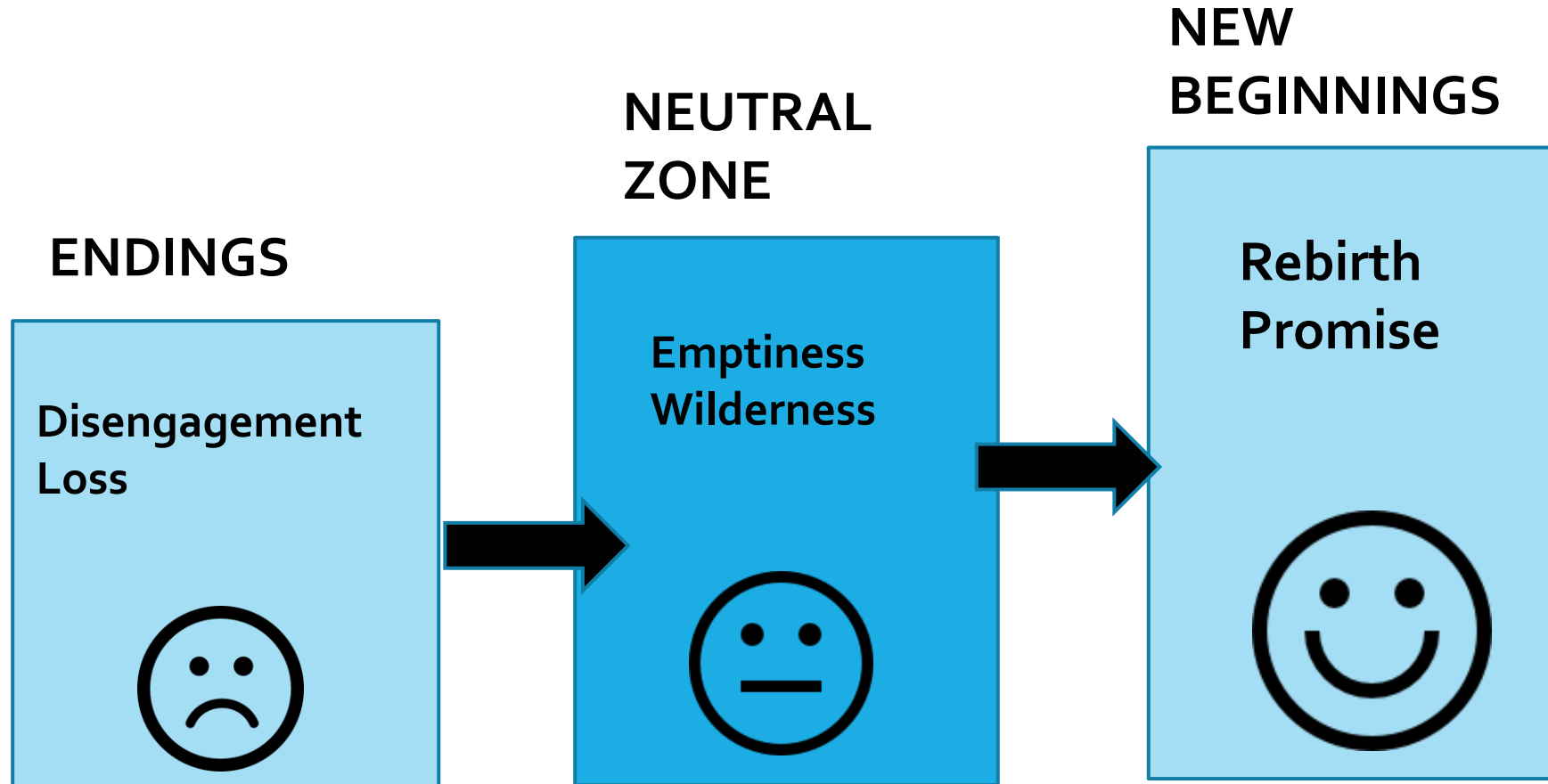
Session Goal

Provide a framework for:

- **Finding your future path,**
- **Assessing your future path readiness.**



Transition Model - William Bridges



Six Major Paths in Retirement

(Nancy K Schlossberg, Ed D)

- **Continuers modify their activities while continuing along a similar path.**
- **Adventurers pursue an unrealized dream or try something new.**
- **Easy gliders decide that retirement is the time to relax.**
- **Searchers are looking for their niche. Any one of us may be a searcher.**
- **Involved spectators still care deeply about their previous work but are no longer players.**
- **Retreaters disengage, often becoming depressed and couch potatoes.**

Transitioning - Your Future Path

1. Identify your purpose, values & personality (look inward)
2. Identify & enhance your focus
3. Anticipate and rehearse your future path



Who Are You?

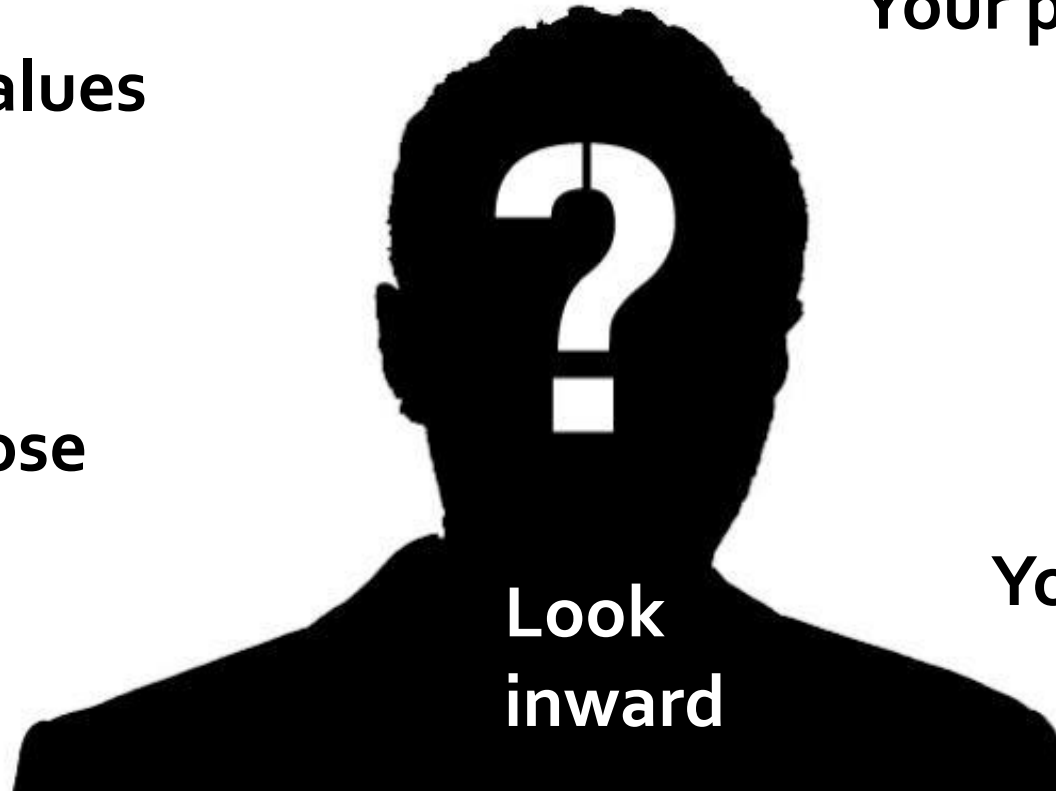
Your values

Your passion

Your personality

Your purpose

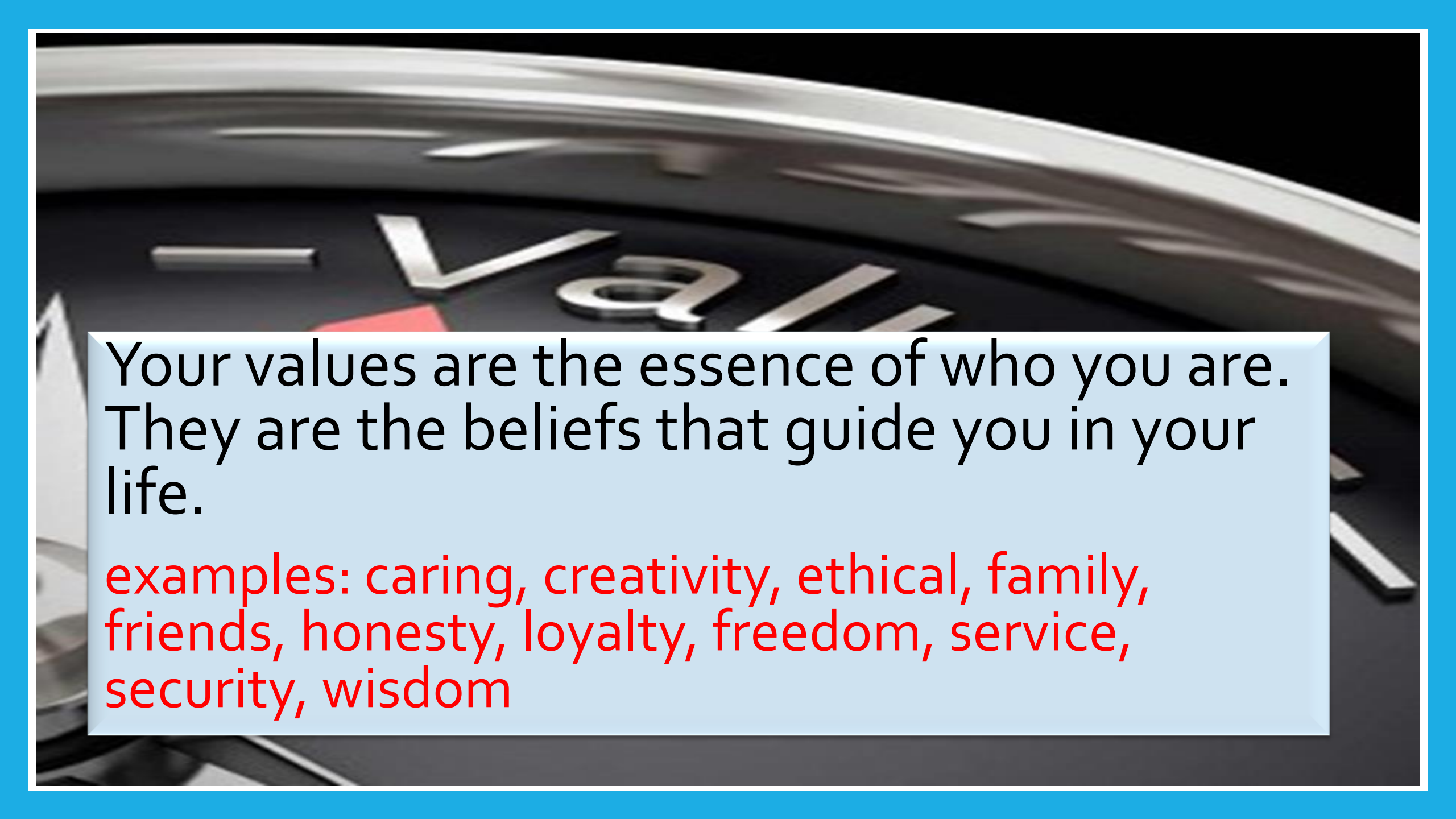
Your strengths



Look
inward

Your Purpose

1. If money didn't matter, what would you be doing?
2. What makes you feel happy and alive?
3. What do you spend your free time doing?
4. What is something that you enjoyed when you were younger?
5. Why are you here?



Your values are the essence of who you are.
They are the beliefs that guide you in your life.

examples: caring, creativity, ethical, family,
friends, honesty, loyalty, freedom, service,
security, wisdom

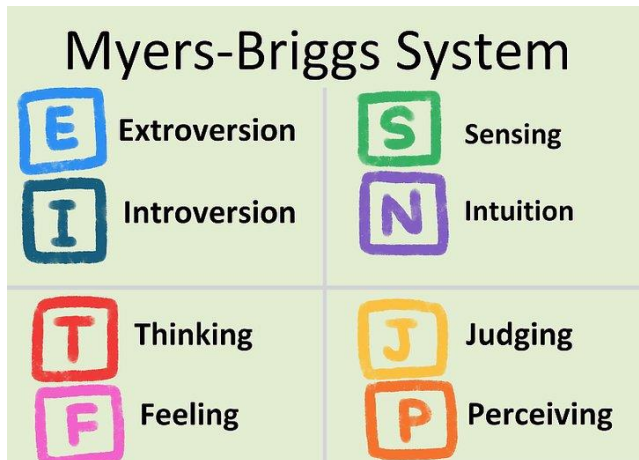
Your Strengths

- What are your unique characteristics/skills?
- What do you excel at/ your achievements?
- What are your hobbies/special interests?
- What have others complimented you about?

Your Personality

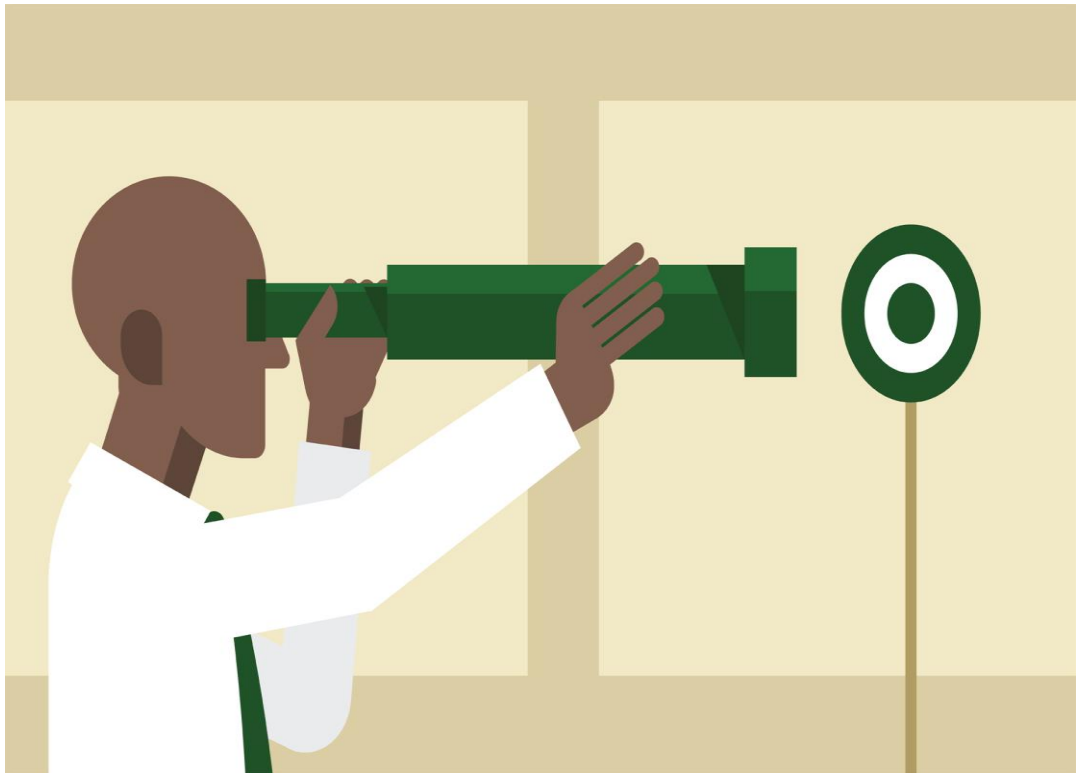


The traits and characteristics that makes you a unique person.
The totality of your behavioral and emotional characteristics.



Your Focus

Doing what you
feel you are meant
to do (for now)
*based on your purpose,
values and strengths*



VISION BOARD

*creates
realness for
your future
path*

*creates a
focus*



Enhance Your Focus

Develop your skills

- Take a class
- Seek out mentors
- Network with like minded community
- Use social media (affinity groups)

Rehearse Your Focus - Tips



Network: (*friends, family, mentors, professionals*)

Leverage social media: (*LinkedIn, Facebook, Instagram, Pinterest, Twitter, Etsy, etc.*)

Know your worth: (*payscale.com, salary.com, glassdoor.com*)

Use websites for leads: (*Upwork.com, Freelancer.com, TaskRabbit.com, etc.*)

Create a website/blog: (*helps to build a strong brand*)

Update your resume: (*for paid & volunteer work*)

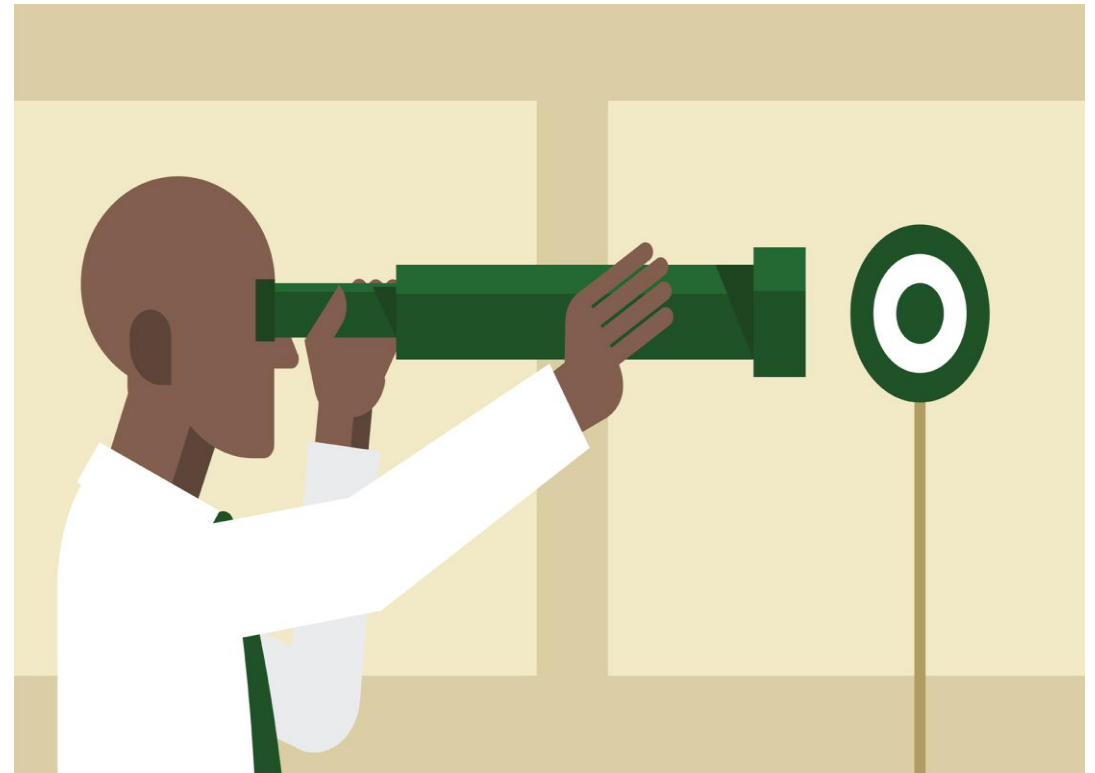
Be positive and “Toot” your own horn.

Retirement Path Assessment

1. What will be your focus?
2. What are your financial objectives, income needed and budget?
3. How will you take care of your health and well-being?
4. Where will you live?
5. What type of social relationships will you have?
6. What community activities will you be involved with?
7. How will you spend leisure time?

Your Focus

What are your passions, interests, strengths, personality and values?



Your Financial Objectives

- How much will/do you have in pensions, investments, savings and an emergency fund?
- What is your estimated retirement budget?
- Will/do you have earned income during retirement?





Your Health

How will/do you lead a healthy lifestyle? (exercising, diet, weight, etc.)



Your Home

What will be your space requirements?

Will you relocate?

How will you manage your possessions.



Your Social Relationships

How will you maintain old friends?

How will you make new acquaintances?



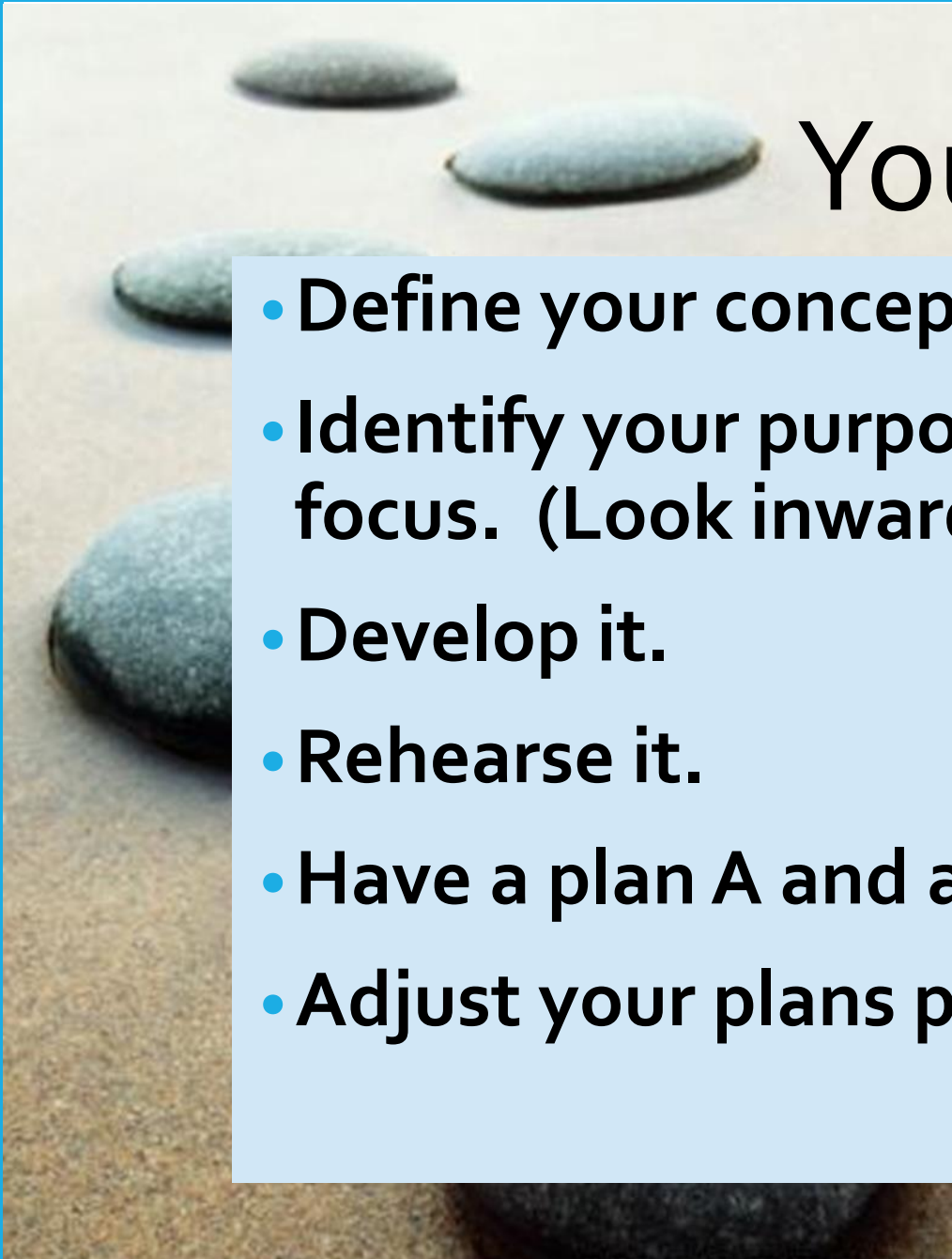
Your Community

How do/will you participate, volunteer, and help others in your community?



Your Leisure

What interests do/will you engage in such as sports, hobbies, vacations, and entertainment?

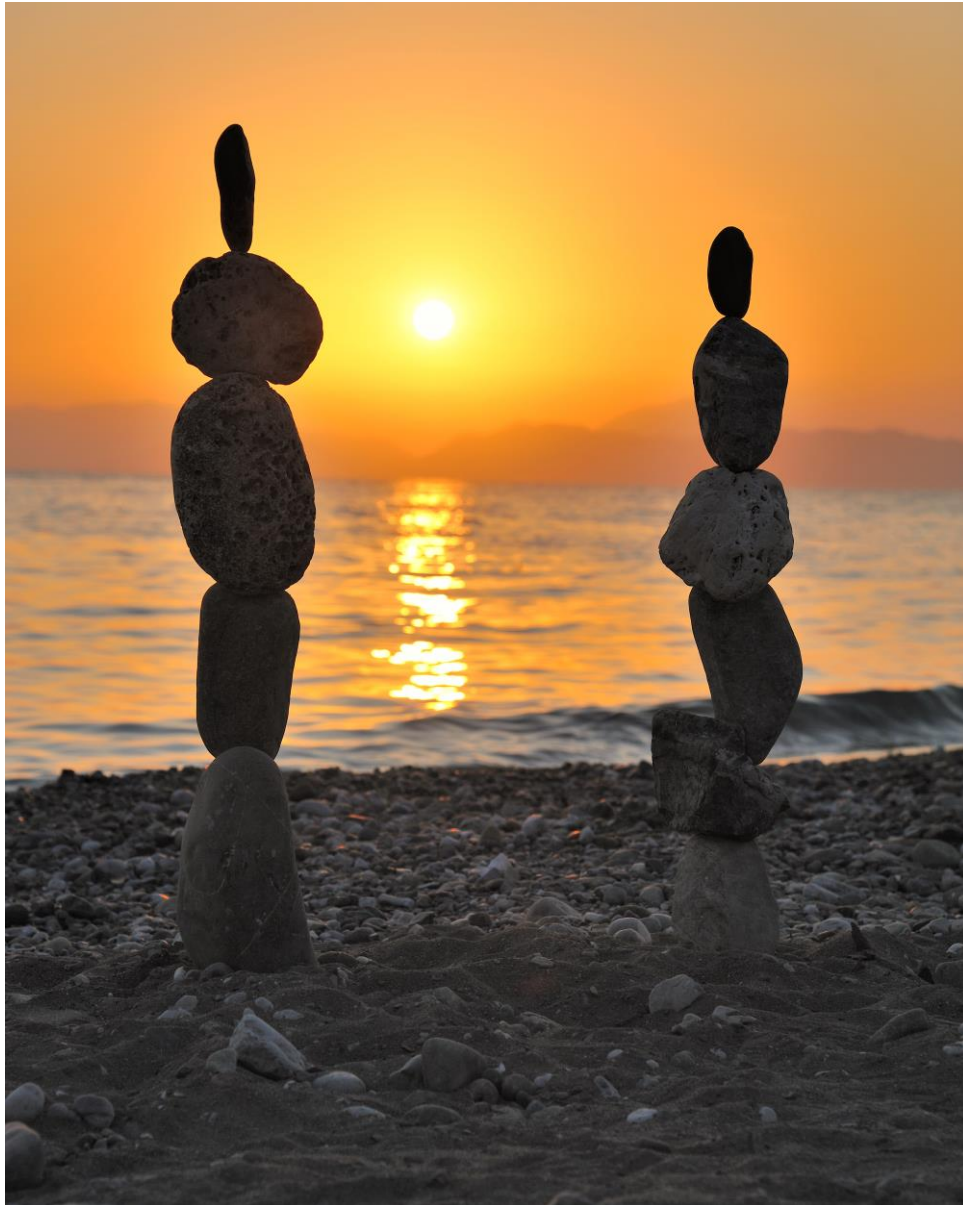


Your Retirement Path

- Define your concept of retirement.
- Identify your purpose, strengths and values to create a focus. (Look inward.)
- Develop it.
- Rehearse it.
- Have a plan A and a plan B. (C & D)
- Adjust your plans periodically.

What is the one thing that you can do today towards your future path?





**WHO OF US CAN SEE, IN ITS
ENTIRETY....THE PATH,
WHETHER IN LIFE OR ART,
AND WHO CAN TELL WHERE IT
WILL END?**

MARC CHAGALL