



Retirement **TRANSFORMED**

Six Steps To Kick-Starting Your Retirement Transformation

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CONGRATULATIONS!

You have made the important decision to take the first steps to a more fulfilling and enjoyable retirement! Just like your path to success in your career, taking the right steps now can ensure you rewrite the story of retirement so you live life to its fullest. It's often too easy to get ourselves in a retirement rut without the structure of the work day and making a change can often become overwhelming. These 6 steps will help get you on the right path to living with purpose, passion and clarity!

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Take Stock of Your Retirement

Start with this 15 question self-assessment to identify opportunities for Retirement Transformation

2

Define Your Priority Area

3

Define the Change you Want to See

4

Define your Biggest Barrier

5

Commit to One New Habit

6

Build an Accountability Plan

LET'S GET STARTED!

STEP 1: Take Stock of Your Retirement

Throughout our professional lives we have been trained to think about success in clear performance metrics and bottom lines. When we transition into Retirement, if we don't build a new framework for success, we may find ourselves dropping into frequent ruts, and feeling rudderless in uncharted waters. Use the questions below to help you begin to consider a new way to measure progress towards living your best retirement. This self-assessment is structured around the five core categories of a Retirement Transformed and is designed to give you a feel for where you are today, identify opportunities to explore new ways to thrive during this time of your life, and set priorities for next steps.

Physical Wellness

We start with the Physical Wellness Assessment because of the impact this has on our ability to live Retirement to our full capacity. As we age, we will be confronted by new physical challenges, so it has never been more important to get this aspect of your life on the right track to maximize the length, and enjoyment of, your Retirement.

On a scale of 1 to 10, how confident are you that:

Not at all Confident —————> Highly Confident

- | | | | | | | | | | | |
|--|---|---|---|---|---|---|---|---|---|----|
| 1 ...your exercise habits are maximizing your ability to stay physically fit as long as possible? | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 2 ...your nutrition habits are maximizing your ability to stay physically fit as long as possible? | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 3 ...you've done all you need to do to seek qualified professional help to guide your physical wellness routines? | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

Physical Wellness Score /30

Mental Wellness

Transitioning out of our "professional career" can have emotional, spiritual, and intellectual impacts on our mental wellness. Without a clear plan to maintain and improve our mental wellness it is easy to fall into a downward spiral, which can cause all areas of your retirement to fall apart.

On a scale of 1 to 10, how confident are you that:

Not at all Confident —————> Highly Confident

- | | | | | | | | | | | |
|--|---|---|---|---|---|---|---|---|---|----|
| 4 ...you are doing all you can to maximize your spiritual and emotional wellness? | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 5 ...you are doing all you can to maintain and stimulate your intellectual capacity? | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 6 ...you've done all you need to do to seek qualified professional help to support the development of a strong mental wellness routine? | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

Mental Wellness Score /30

Relationships

Throughout our career we build networks of clients, colleagues, mentors, mentees and other contacts who are all tied to you through your professional identity. When we enter retirement this entire community all of a sudden feels distant and out of reach. Retirement requires us to be more intentional about our relationships to maintain and build a meaningful community to maintain a sense of belonging.

On a scale of 1 to 10, how confident are you that:

Not at all Confident —————> Highly Confident

7 ...you fully understand the type of people and networks you want to surround yourself with in the future?

1 2 3 4 5 6 7 8 9 10

8 ...you are doing all you can to maintain and strengthen important relationships from your past?

1 2 3 4 5 6 7 8 9 10

9 ...you are doing all you can to build new relationships for your future?

1 2 3 4 5 6 7 8 9 10

Relationship Score

/30

Spouse/Partner Relationship

Any change in relationship dynamic can have unexpected consequences and/or opportunities. Retirement can shock and test the best of relationships, especially when one or both of you have found great fulfillment over the years from a thriving career. Take a moment to assess your relationship to make sure you and your spouse/partner are doing all you can to thrive together in Retirement.

On a scale of 1 to 10, how confident are you that:

Not at all Confident —————> Highly Confident

10 ...you and your spouse/partner are looking forward to spending substantially more time together?

1 2 3 4 5 6 7 8 9 10

11 ...you and your spouse/partner have the practices and routines needed to continue building and strengthening your relationship?

1 2 3 4 5 6 7 8 9 10

12 ...you and your spouse/partner have a shared vision for what you want your relationship to be like in Retirement?

1 2 3 4 5 6 7 8 9 10

Spouse/Partner Relationship Score

/30

Wisdom Sharing

Every phase of our life is preparing us for what's next: from preschool, to elementary school, to high school, to more school, to your first job, your first promotion, so on and so forth. When retirement hits, so many assume that there is no next thing to prepare for...but you've just spent decades of your life learning and growing. Why would you box up your wisdom and put it on a shelf when that is the main asset that will give you all the fulfillment you could ever want or need in Retirement?

On a scale of 1 to 10, how confident are you that:

Not at all Confident —————> Highly Confident

- | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|----|
| 13 ...you are clear on the <i>type of wisdom</i> and knowledge you can use to bring value to others? | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 14 ...you are clear on <i>how</i> you will share that wisdom and knowledge with others? | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 15 ...you are clear on <i>who</i> you want to share your wisdom and knowledge with? | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

Wisdom Sharing Score

/30

Your Overall Retirement Score

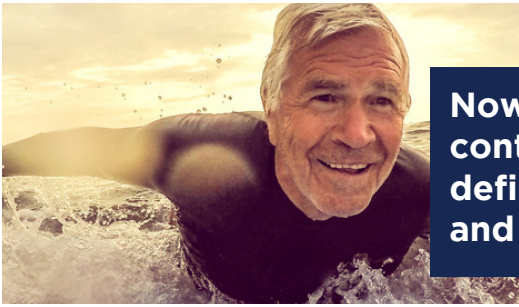
/150



Congratulations on taking the first step and completing the assessment!

After taking this assessment, you should have identified some opportunities for Retirement Transformation





Now let's keep the momentum going and continue on to the next steps where you will define your first priority, a vision for change, and your plan to transform.



STEP 2: Define Your Priority Area

One of the reasons we find ourselves falling into a rut is that we don't allow ourselves to build up momentum. The goal here is to be clear on which retirement area you want to begin experiencing some small and meaningful wins. This could be the category with the lowest score, or perhaps the area that you know is the primary reason you aren't living your best retirement.

Your Priority Area: _____

Example Client:

Relationships

"When working with Retirement Transformed, their worksheets and questions about my career, experiences, and relationships were thought provoking and profound. All of this has become the build blocks to my retirement. My thoughts are expanding to include a specific vision for retirement in which I am present, and not part of the passing parade. When I write down my thoughts/expectations/plans, I hold myself accountable. There is no need to be rudderless. Instead, I can work on goals the will allow me to be present. Integrating life's experiences into my future can help prepare me for a meaningful, joy-filled retirement. I recommend their course to anyone looking to enrich their retirement life." — Terry H.

STEP 3: Define the Change you Want to See

We believe that visions are essential to motivating change, however big or small. In this step we want you to take some time to think "In what way do I want this retirement category to be stronger". The key is to make sure this is meaningful to you. While we recommend you be as specific as possible, just make sure this is something that gives you a clear sense of success in this area.

The Change you Want to See: _____

Example Client:

I want to reconnect with old friends from my college days

STEP 4: Define your Biggest Barrier

The first step is often the hardest step when trying to change. We may face internal or external barriers to change but we can overcome those barriers, especially when we call them out and create a plan to move through them! Your plan to overcome the barrier could include, for example, research, professional help, personal reflection, or even just getting organized. Take a moment to put some deep thought into this part of the process.

Biggest Barrier: _____

My plan to overcome that barrier: _____

Example Client:

Biggest Barrier: I don't know what communities I could be part of. My plan to overcome that barrier: I'll research different outdoor social clubs to find the right space for me.

"As I moved into retirement, I didn't like the word. It has a connotation that you are giving up or letting go. I prefer to use the term 'Renaissance' as it sounds more positive. Working with Mark gave me a path to being productive in my Renaissance. As a business owner, I always did a great deal of strategy and planning. It is just as important to continue this, and that is what Mark is about. I recommend him as a coach." — Carter G.

STEP 5: Define the one habit you will implement to strengthen this category

Once you're clear on what area of your retirement you want to strengthen, and how you'll get over your barrier(s), your next step is to identify the habit that you believe will help you realize change. You can rinse and repeat step 5 as many times as you would like, so don't feel like this needs to capture all of the changes you want to experience. Just focus on one new habit. Once that habit is ingrained you can think about adding a new one.

Your New Habit Commitment:

"I will spend _____ minutes _____ every _____ at _____
to transform _____."

Example Client:

"I will spend 30 minutes emailing, calling or grabbing coffee with old friends every Monday through Friday at 9am to transform my relationships in Retirement."

Other Examples: "I will spend 15 minutes stretching my back and legs every weekday at 8:00am to transform my physical wellness. I will spend 90 minutes cooking and enjoying a gourmet meal with my spouse every Tuesday and Thursday at 6pm to transform our relationship"



**You've always
planned your
way to a
successful
career.**

**With retirement, there's no
difference. This step helps
you define a clear path
for accountability
in this new
chapter
of life.**

STEP 6: Build an Accountability Plan

We believe that finding ways to build accountability into your plan is essential for success. You could find an accountability partner who also wants to strengthen their retirement. But the key here is to announce your plan out loud so someone can hear it, and then let them know how you're doing.

Your Accountability Plan: _____

Accountability Partner/Partners _____

Example Client: _____

Your Accountability Plan: I will send an email blast to all of my old friends letting them know that I'm hoping to reconnect, and that they should expect a call or invitation for coffee in the coming weeks.



Bonus Accountability Hack

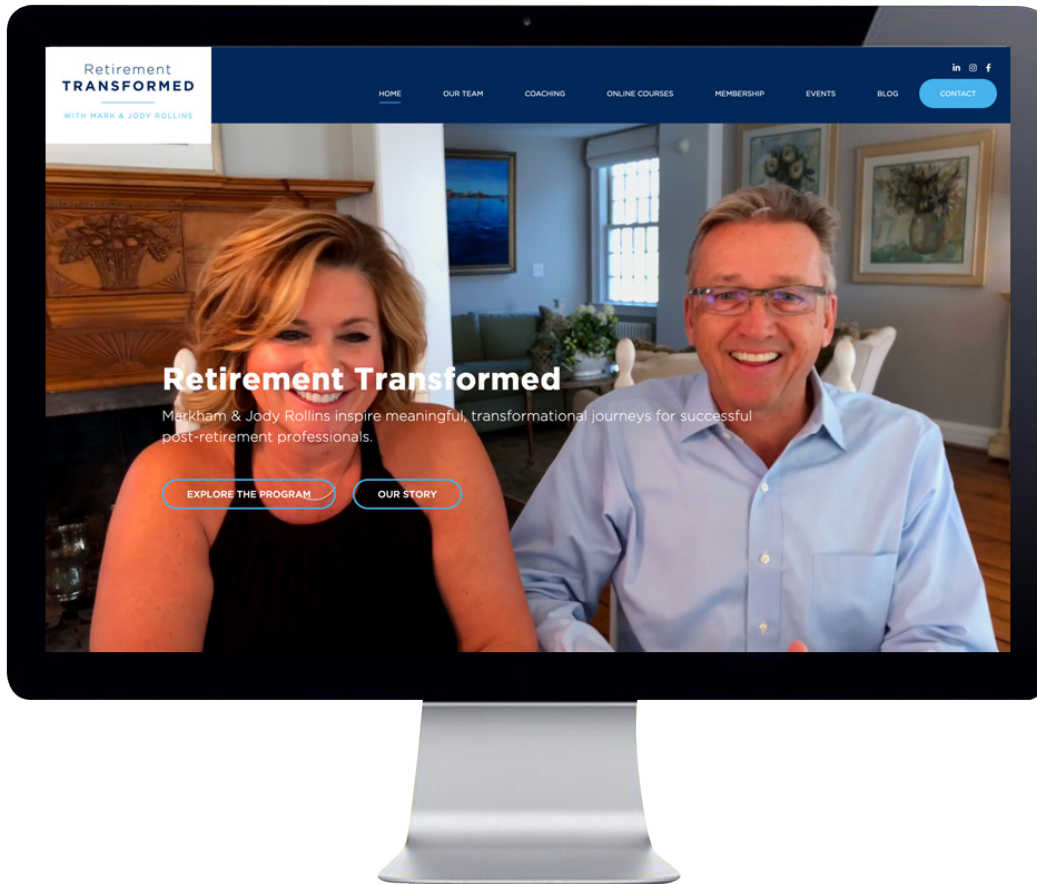
Go to the Retirement Transformed Facebook Group and share your new habit commitment with the rest of the community!

We always love learning how people are transforming their retirement and it helps to motivate others to do the same!

GOOD WORK!

You're on your way to a successful retirement

If you enjoyed this tool, take a look at our website for other opportunities to live a Retirement Transformed.



"After taking the Retirement Transformed online course, I could really relate to the information that was provided. Recognizing the need for balance in all areas of my life has been exceedingly helpful! Most of us have focused way too much on career success to the detriment of the other more important areas of our life and this course brought an incredible amount of clarity around this. I absolutely feel that anyone facing many of the common retirement challenges would benefit from Mark & Jody's experiences and information." — Roger S.

To continue your journey towards a Retirement Transformed check out our self-guided online course titled *"Your Retirement Game Plan"* that takes a look at all of your retirement categories and helps you build a robust action plan to thrive in retirement. If you're looking for something more customized, feel free to give us a call at 914.481.0119 and ask about our Coaching Programs.

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