

# RETIREMENT REIMAGINED

## WORKBOOK



# The way we plan for retirement is incomplete.

Retirement planning typically focuses on *financial* planning: savings plans, investments, tax and estate planning.

Of course it's important to save enough money for retirement, but retirement success isn't only about the money. Our careers give us more than just a regular paycheck, so it's not just the income we will need to replace when we retire.

We also need to find ways to replace the other benefits we get from our work: status, identity, friendships, challenge, structure and purpose.

Retirement Lifestyle Planning addresses this often overlooked piece; helping us to define the life that we want to retire *to*.



## Have you considered:

What will give your life meaning and purpose when you're no longer working full-time?

How you will replace the structure or routine that your career provides?

How you will define yourself when you're no longer a (insert your job title, here)?

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The Retirement Life Planning MAP is designed to help you answer these and other questions you might not have considered when you began planning for your retirement.

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The Retirement Life Planning **MAP** looks at 3 retirement success factors: **M**indset, **A**uthentic Self, and **P**urpose:

## **MINDSET**

Research has shown that our mindset has an important role in shaping our retirement experience.

Are you looking forward to retirement as a new beginning, or are you viewing it as an ending? With awareness, you can shift into a growth mindset to find purpose and meaning in your retirement years.

## **AUTHENTIC SELF**

Authentic Self refers to the unique person you are, beyond societal expectations and external influences. It is your true self, and is not your career identity.

By uncovering your Authentic Self (the unique combination of your values, strengths and interests), you can choose to create a retirement life that makes you happy.

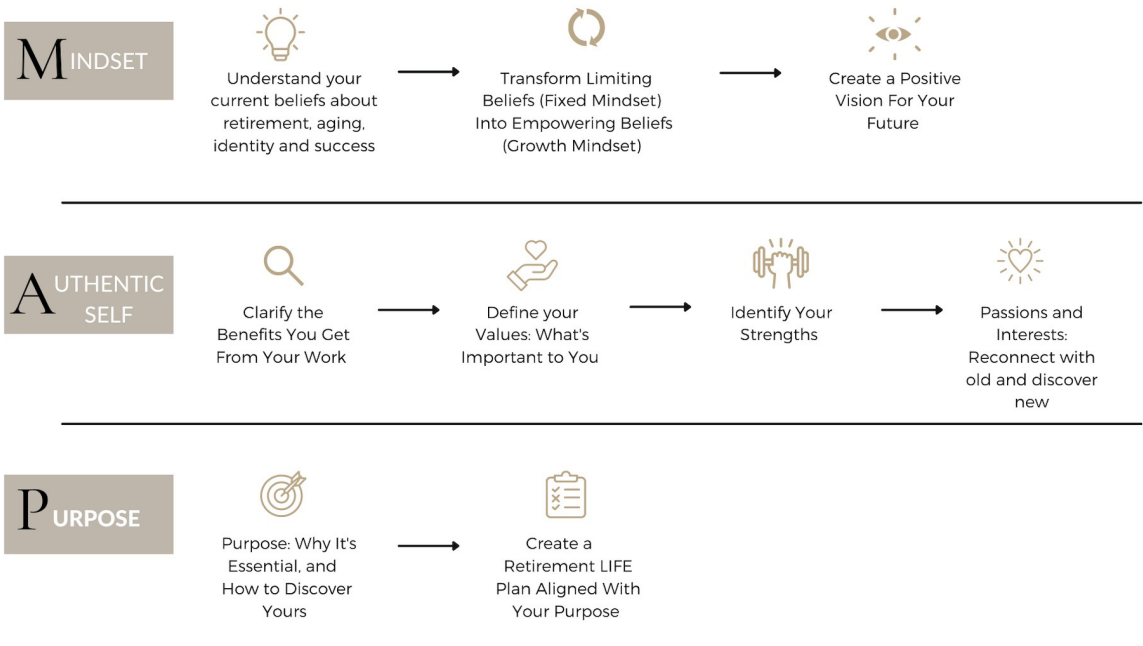
## **PURPOSE**

Your Purpose is to live a life that is true to you, by living in alignment with your values, strengths and interests.

How can you use your unique wisdom, skills, interests and passions to create a fulfilling plan for this next phase of your life?

# Design Your Successful Retirement with the Retirement Life Planning MAP

## The Retirement Life Planning MAP



Work through your Life Planning MAP at your own pace. Share your answers with your spouse or partner and your financial advisor.



WHAT ARE YOUR BIGGEST CONCERNS ABOUT RETIREMENT?

Outliving my money <input type="checkbox"/>	Difficult family relationships <input type="checkbox"/>
Caring for elderly parents <input type="checkbox"/>	Leaving a legacy <input type="checkbox"/>
Possibility of health issues in the future <input type="checkbox"/>	Replacing the structure from work <input type="checkbox"/>
Not feeling productive or useful <input type="checkbox"/>	Losing my identity or status <input type="checkbox"/>
Not having enough money to live the lifestyle I want <input type="checkbox"/>	Supporting my adult children <input type="checkbox"/>
Not having a plan <input type="checkbox"/>	Missing the challenge of work <input type="checkbox"/>
Missing my friends from work <input type="checkbox"/>	Other: <input type="checkbox"/>
Boredom <input type="checkbox"/>	Other: <input type="checkbox"/>



WHAT ARE YOU LOOKING FORWARD TO IN RETIREMENT?

No deadlines <input type="checkbox"/>	<input type="checkbox"/>
Rest & relaxation <input type="checkbox"/>	<input type="checkbox"/>
Starting a second career <input type="checkbox"/>	<input type="checkbox"/>
Having time for hobbies & interests <input type="checkbox"/>	<input type="checkbox"/>
More time for friends & family <input type="checkbox"/>	<input type="checkbox"/>
Volunteering <input type="checkbox"/>	<input type="checkbox"/>
Giving back <input type="checkbox"/>	<input type="checkbox"/>
Freedom to do things I want <input type="checkbox"/>	<input type="checkbox"/>

“Successful retirements result from retiring ‘to’ a positive vision of life after the career transition.”

STANFORD CENTER ON LONGEVITY

# What do you like about your work?

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For many of us, working isn't just *what we do*, it's *who we are*. Work has become such an important part of our identity that we will need to find ways to replace the benefits we get from our work if we are to be happy in retirement. Besides the regular paycheck, what do you like about your work?

Achievement

Purpose

Accomplishment

Learning

Time management

Status

Routine

Identity

Challenge

Relationships

Leadership

Respect

Clearly defined goals







## What are your values?

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Our values define who we are and what's important to us. They can help us find clarity during transition and guide us when making important decisions.

Achievement <input type="checkbox"/>	Faith <input type="checkbox"/>	Learning <input type="checkbox"/>
Adventure <input type="checkbox"/>	Friendship <input type="checkbox"/>	Love <input type="checkbox"/>
Balance <input type="checkbox"/>	Fun <input type="checkbox"/>	Loyalty <input type="checkbox"/>
Beauty <input type="checkbox"/>	Growth <input type="checkbox"/>	Peace <input type="checkbox"/>
Compassion <input type="checkbox"/>	Happiness <input type="checkbox"/>	Recognition <input type="checkbox"/>
Challenge <input type="checkbox"/>	Honesty <input type="checkbox"/>	Respect <input type="checkbox"/>
Community <input type="checkbox"/>	Humour <input type="checkbox"/>	Security <input type="checkbox"/>
Competency <input type="checkbox"/>	Influence <input type="checkbox"/>	Spirituality <input type="checkbox"/>
Contribution <input type="checkbox"/>	Kindness <input type="checkbox"/>	Success <input type="checkbox"/>
Creativity <input type="checkbox"/>	Knowledge <input type="checkbox"/>	Truth <input type="checkbox"/>
Family <input type="checkbox"/>	Leadership <input type="checkbox"/>	Wisdom <input type="checkbox"/>

# What are your strengths?

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Research in positive psychology has shown that knowing your strengths (and using them every day) is an important first step in leading an authentic and happy life.

What are your natural strengths?

Creating <input type="checkbox"/>	Designing <input type="checkbox"/>	Implementing <input type="checkbox"/>
Evaluating <input type="checkbox"/>	Mediating <input type="checkbox"/>	Organizing <input type="checkbox"/>
Leading <input type="checkbox"/>	Influencing <input type="checkbox"/>	Teamwork <input type="checkbox"/>
Mentoring <input type="checkbox"/>	Coaching <input type="checkbox"/>	Writing <input type="checkbox"/>
Speaking <input type="checkbox"/>	Strategizing <input type="checkbox"/>	Bravery <input type="checkbox"/>
Planning <input type="checkbox"/>	Empowering <input type="checkbox"/>	Learning <input type="checkbox"/>
Facilitating <input type="checkbox"/>	Educating <input type="checkbox"/>	Competing <input type="checkbox"/>
Motivating <input type="checkbox"/>	Innovating <input type="checkbox"/>	Managing <input type="checkbox"/>

What are the skills and abilities that others compliment you on?

# What are your interests?

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What activities do you like to do now, Liked to do in the past or would like to do in the future?

Gardening <input type="checkbox"/>	Acting <input type="checkbox"/>	Tennis <input type="checkbox"/>
Woodworking <input type="checkbox"/>	Singing <input type="checkbox"/>	Theatre <input type="checkbox"/>
Building <input type="checkbox"/>	Time with Pets <input type="checkbox"/>	Racquetball <input type="checkbox"/>
Renovating <input type="checkbox"/>	Badminton <input type="checkbox"/>	Bowling <input type="checkbox"/>
Painting <input type="checkbox"/>	Golfing <input type="checkbox"/>	Quilting <input type="checkbox"/>
Dancing <input type="checkbox"/>	Traveling <input type="checkbox"/>	Crosswords <input type="checkbox"/>
Yoga <input type="checkbox"/>	Writing <input type="checkbox"/>	Sewing <input type="checkbox"/>
Hiking <input type="checkbox"/>	Wine Tasting <input type="checkbox"/>	Knitting <input type="checkbox"/>
Skiing <input type="checkbox"/>	Sketching <input type="checkbox"/>	Biking <input type="checkbox"/>
Snowshoeing <input type="checkbox"/>	Sculpting <input type="checkbox"/>	Baking <input type="checkbox"/>
Walking <input type="checkbox"/>	Sailing <input type="checkbox"/>	Surfing <input type="checkbox"/>

# What are your interests?

What activities do you like to do now; Liked to do in the past; or would like to do in the future?

Fishing <input type="checkbox"/>	Boating <input type="checkbox"/>	Boardgames <input type="checkbox"/>
Scrapbooking <input type="checkbox"/>	Swimming <input type="checkbox"/>	Concerts <input type="checkbox"/>
Photography <input type="checkbox"/>	Cooking <input type="checkbox"/>	Running <input type="checkbox"/>
Weight training <input type="checkbox"/>	Biking <input type="checkbox"/>	
Camping <input type="checkbox"/>	Movies <input type="checkbox"/>	
Collecting <input type="checkbox"/>	Meditating <input type="checkbox"/>	
Horseback riding <input type="checkbox"/>	Hockey <input type="checkbox"/>	
Music <input type="checkbox"/>	Reading <input type="checkbox"/>	
Snowboarding <input type="checkbox"/>	Shopping <input type="checkbox"/>	
Kayaking <input type="checkbox"/>	Museums <input type="checkbox"/>	
Waterskiing <input type="checkbox"/>	Nature walks <input type="checkbox"/>	



# Purpose

Your purpose is to live in alignment with who you really are - Your unique combination of your values, strengths, and interests. Your Authentic Self.

How can you use your unique wisdom, skills, interests and passions to create a fulfilling plan for this next phase of your life?

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Your Purpose is to  
live in alignment  
with your  
Authentic Self

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PURPOSE

List your top values, strengths and interests below:

VALUES

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STRENGTHS

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INTERESTS

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# About Tammy

Tammy Vigue is a retirement coach and speaker who is passionate about retirement planning *beyond the numbers*.

Having worked in the financial industry for nearly 20 years, she was struck by the number of people approaching retirement who did not have a plan for what they were retiring *TO*. A retirement LIFE plan.

She created Retirement Reimagined to help people transition into a uniquely meaningful next phase of life.

This program combines Tammy's formal study of psychology and coaching with her passion for personal development.



To find out more about the retirement coaching programs available, visit [www.tammyvigue.com](http://www.tammyvigue.com) or contact Tammy at [tammy@tammyvigue.com](mailto:tammy@tammyvigue.com)