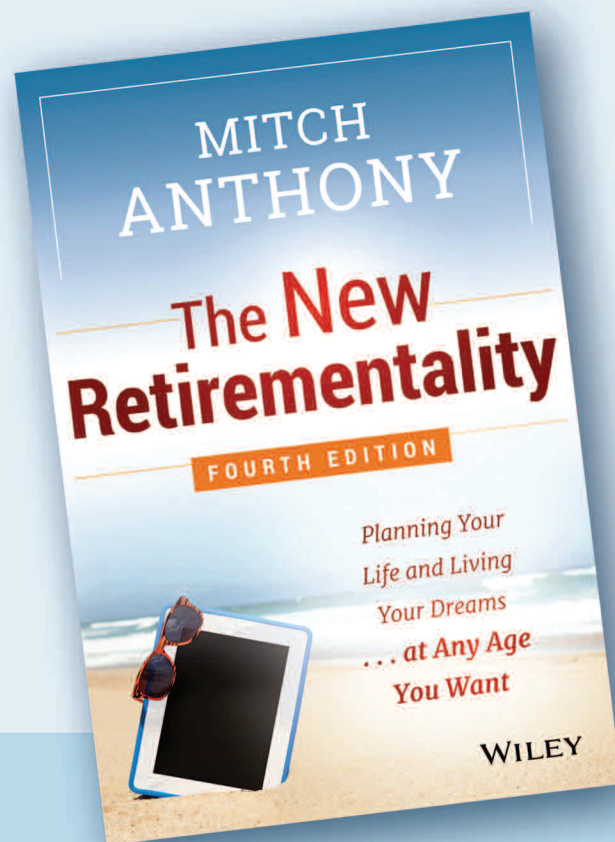
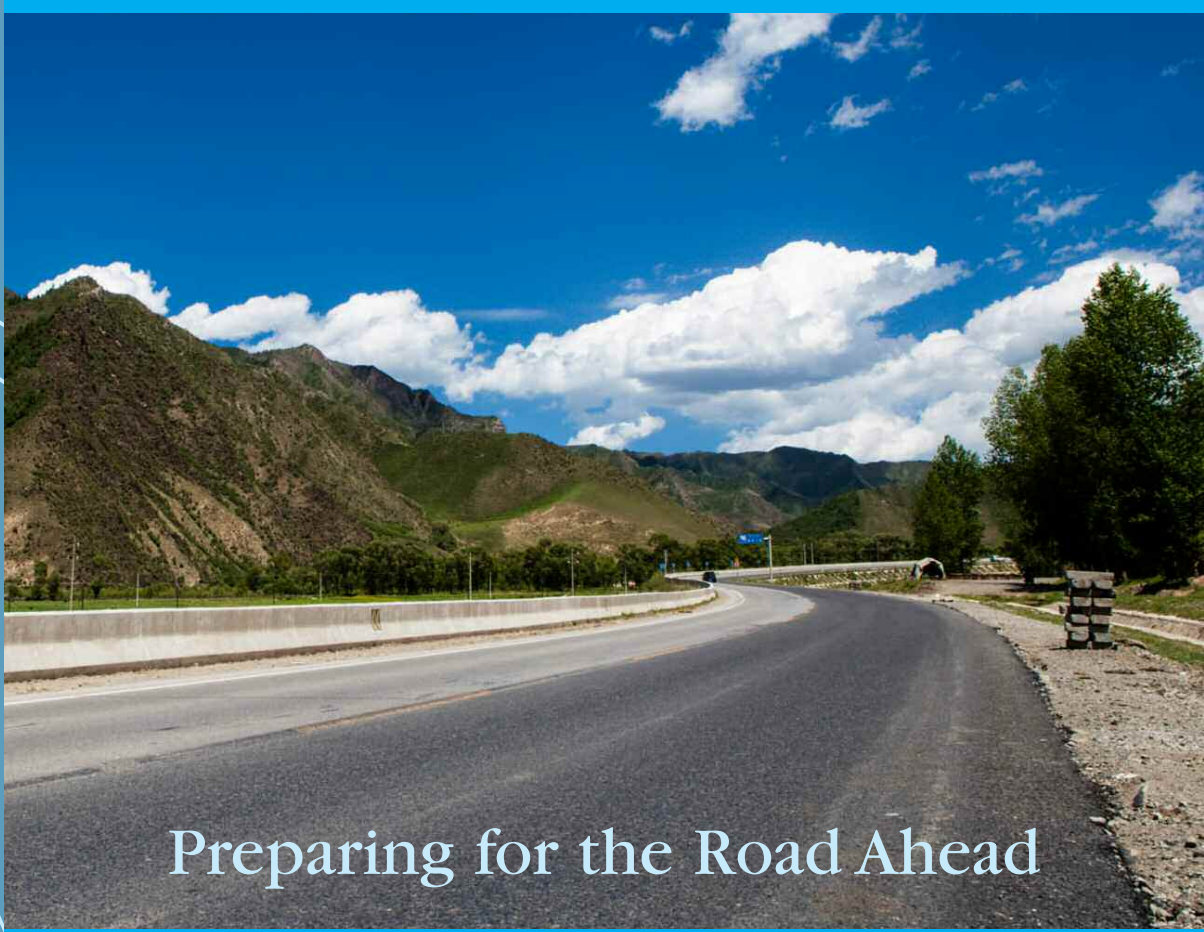


# Accredited Retirement Coaching

with **Mitch Anthony,**  
*America's Retirement Coach*



# My Retirementality™ Profile



Preparing for the Road Ahead

# My Retirement Observations

Directions: Below are the attributes you have witnessed in those who have retired well and those who have not. In column one, choose the attributes that concern you; in column two, choose the attributes that you've observed.

## Attributes of Those Who Have Not Retired Well

(Check all that concern you)

- Lack of challenges
- Boredom
- No (or not enough) hobbies
- No social network
- Marital strain
- Trouble adapting
- Feeling isolated
- Loss of identity
- Intellectual decline
- Lack of structure
- Upended plans
- Health issues
- Loss of spouse or partner
- Not enough savings
- Fear of spending money

## Attributes of Those Who Have Retired Well

(Check all that you've observed)

- Active bucket list
- Community engagement
- Robust network
- Active social life
- Work (at least part-time)
- Fulfilling hobbies
- Routines
- Purpose-driven activities
- Well thought-out plan
- Positive family relationships
- Coaching/mentoring
- Physical activity
- Supporting a cause
- Having enough savings
- Still challenging self



# My Retirementality™ Profile

**Directions:** Within each group, choose the phrase that best describes you, with 4 being the best and 1 being the least. Total each letter on the bottom of the page. Do not leave any spaces blank, and be sure each group has a 1, 2, 3, and 4 rating.

## SAMPLE

A   3    
 B   1    
 C   4    
 D   2  

- A\_\_ I love to kick back and relax.
- B\_\_ I love to spend time with family and friends.
- C\_\_ I love exercising.
- D\_\_ I love my work.

- A\_\_ I want to play every day.
- B\_\_ I want to plan some family trips.
- C\_\_ I want to pay more attention to my spiritual well-being.
- D\_\_ I want to use my abilities to help others.

- A\_\_ I want to spend more time on hobbies and other interests.
- B\_\_ I want to make deeper connections.
- C\_\_ I want to expand my interests.
- D\_\_ I have a sense of calling.

- A\_\_ I want to start working on my “bucket list.”
- B\_\_ I want to start making memories.
- C\_\_ I want to get in top shape.
- D\_\_ I want to make a difference in the world.

- A\_\_ I want to get away from work.
- B\_\_ I want to spend more time with my spouse.
- C\_\_ I want to seek balance and meaning.
- D\_\_ I want to continue doing what I do.

- A\_\_ I want to wake up to an empty agenda.
- B\_\_ I want to be more involved in the community.
- C\_\_ I want to increase my energy level.
- D\_\_ I want to feel challenged intellectually.

- A\_\_ I want to visit a lot of places.
- B\_\_ I want to catch up with friends.
- C\_\_ I want to make health a priority.
- D\_\_ I want to continue finding new challenges.

- A\_\_ I have many interests to take up my time.
- B\_\_ There are groups that I want to connect with.
- C\_\_ I want to lower my stress level.
- D\_\_ I want to continue using my skills at some level.

- A\_\_ I look forward to “every day is Saturday.”
- B\_\_ I look forward to spending more time with the people who are important to me.
- C\_\_ I look forward to more personal growth.
- D\_\_ I look forward to interacting with people I work with.

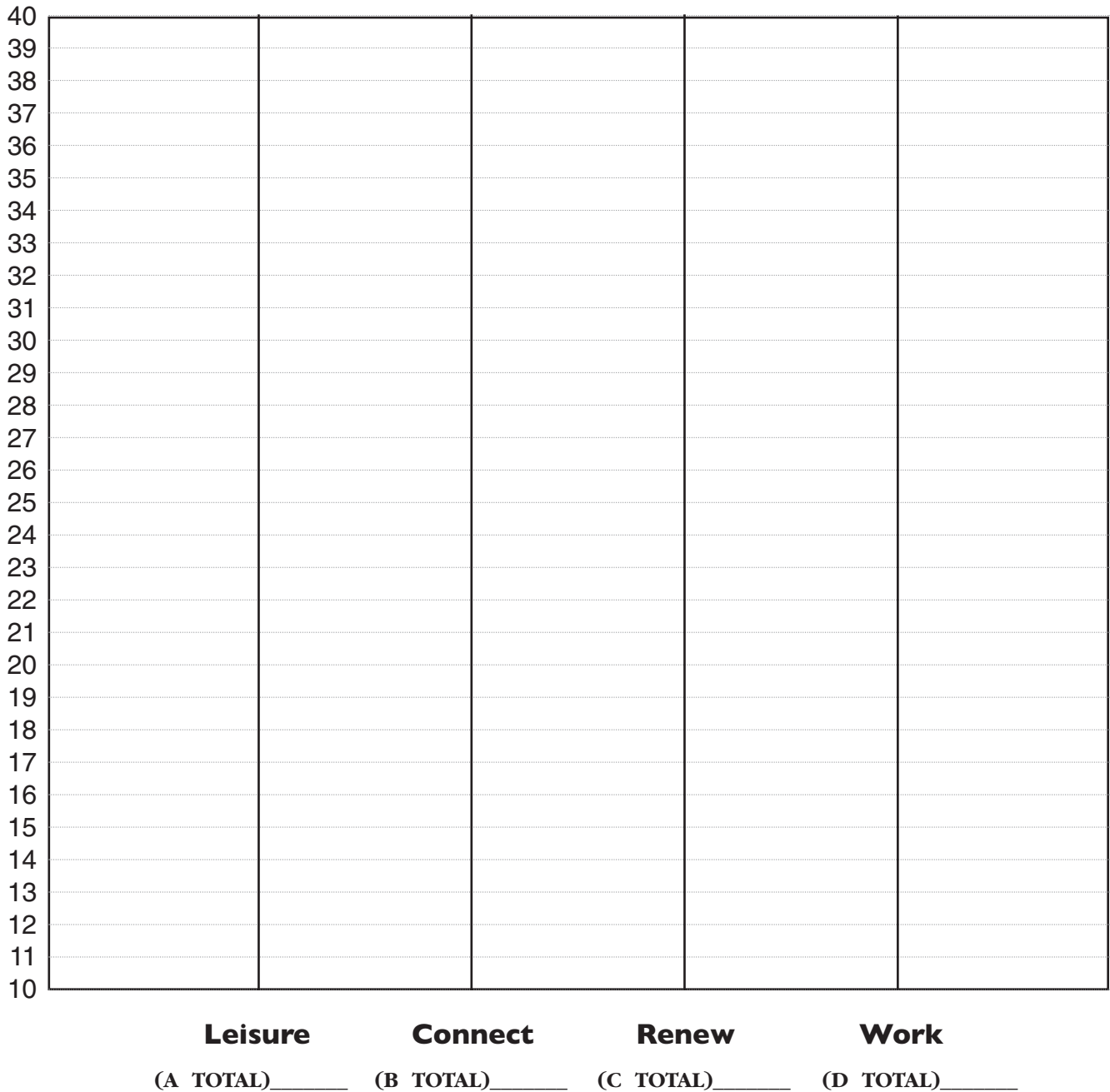
- A\_\_ There are places I want to go.
- B\_\_ I want to invest in relationships.
- C\_\_ I want to read and learn more.
- D\_\_ I am highly engaged in what I do professionally.

Add up totals for each and record in the box below.

**TOTALS:**    **A** =     **B** =     **C** =     **D** =

# My Retirementality™ Profile

Directions: Once you've totaled your findings, graph your "A" total on the Leisure line, "B" total on the Connect line, "C" total on the Renew line, and "D" total on the Work line. Draw a line to connect the dots. The results will help you and your advisor determine what is important to you and how to integrate your profile into your plans for the future.



**LEGEND**

**A. LEISURE = PLAY, TRAVEL, HOBBIES**

**B. CONNECT = TIME FOR FAMILY/FRIENDS**

**C. RENEW = PHYSICAL/MENTAL/SPIRITUAL WELL-BEING**

**D. WORK = PROFESSION, HELPING OTHERS**

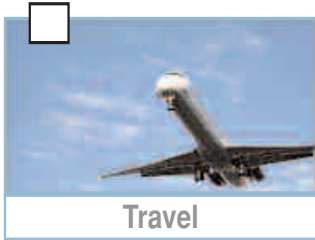


# Your Life Profile

# Visioning

Our visioning process in the **24 Things to do in Retirement** exercise will help you get a clearer picture of what you want to experience in the rich years ahead.

**Directions:** Choose 6 images below that fit your vision for retirement.



Travel



Explore



Play



Write



Relax



Teach



Go Back to School



Educate Yourself



Mentor Someone



Learn a new skill



Develop a Hobby



Finish Unfinished Projects



Home Projects



More Time with Spouse



More Time with Family



More Time with Friends



Start a New Business



Continue on Present Course



Consult



Get a Part-Time Job



Connect with a cause



Volunteer



Get more Involved in Community



Take on a New Challenge





