

Accredited Retirement Coaching

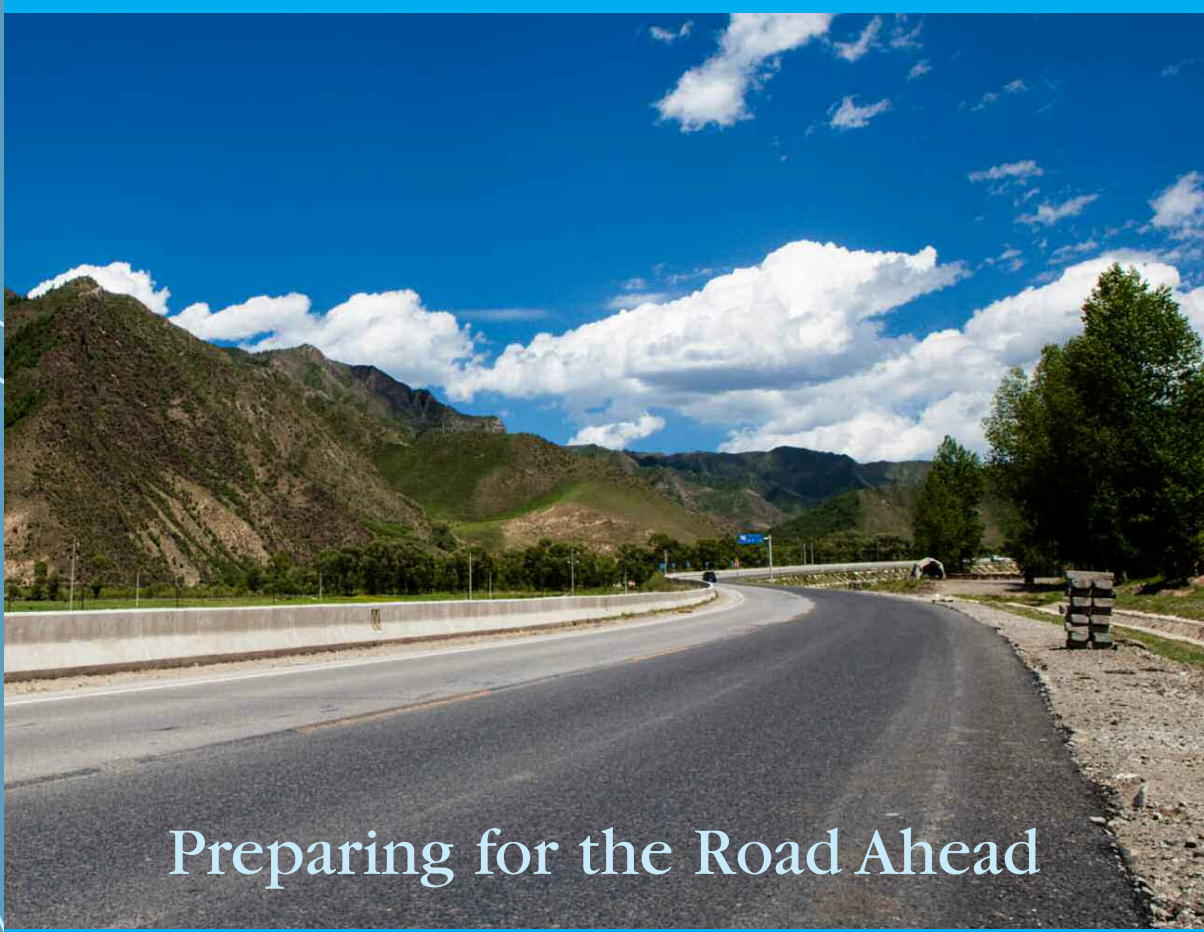
with **Mitch Anthony**,
America's Retirement Coach



Mitch Anthony

Building Relationships That Last a Lifetime

My Retirementality™ Profile



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



Look at the following list of Reasons for Working and rank them 1-5 (with 1 being the lowest and 5 being the highest) in order of importance to you.

Motivator Type	Score (0-50)
Existential Motivators	15
Economic Motivators	45

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 =

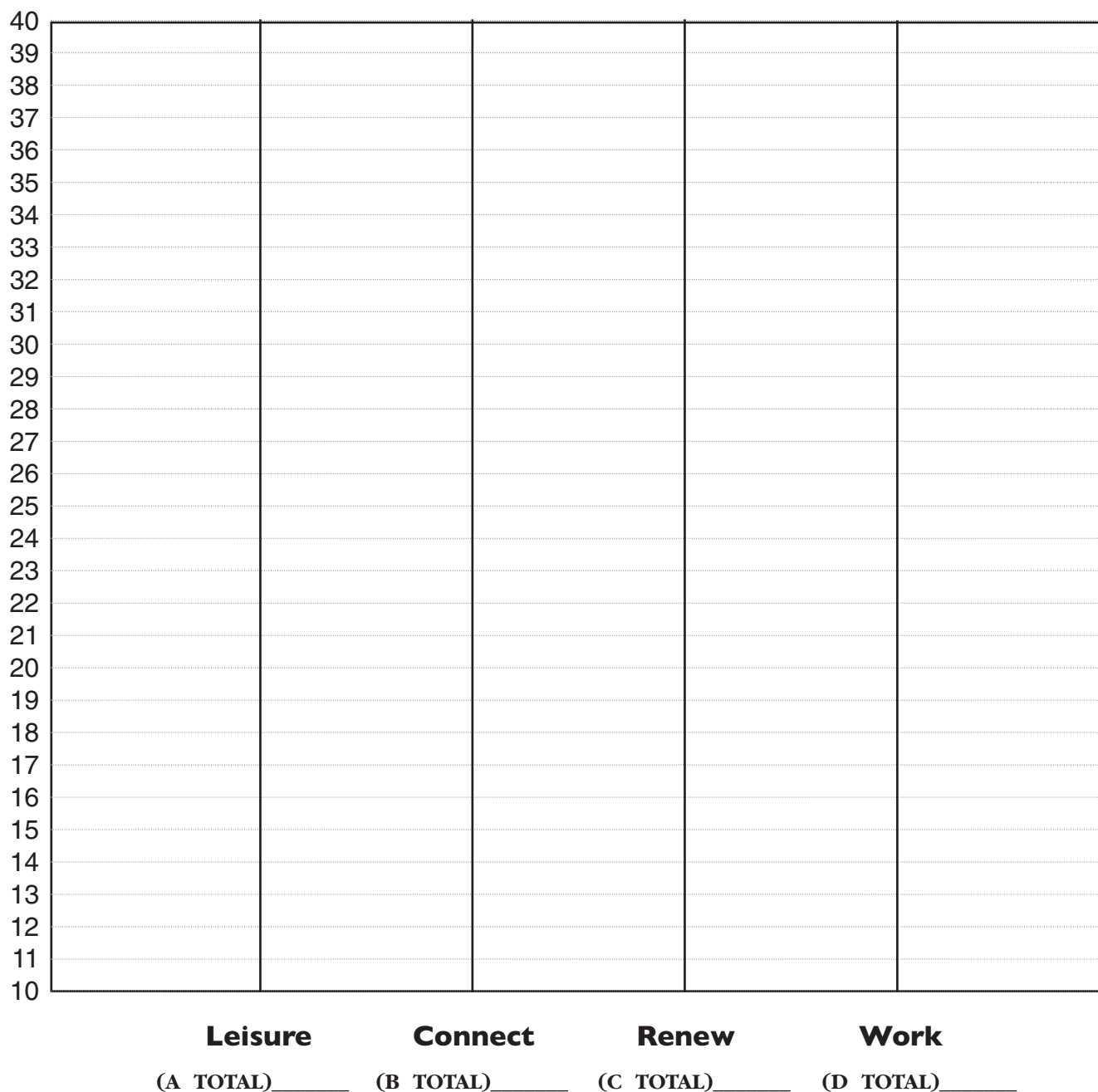
B =

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



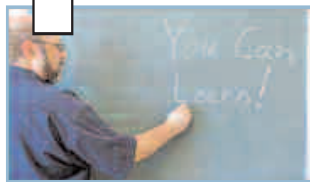
Write



Relax



Teach



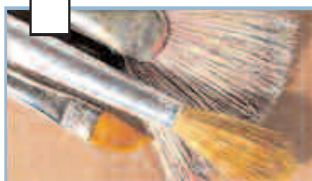
Go Back to School



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

NOTES

[illegible]

My Retirementality™ Profile

NOTES

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.