

ROL Advisor

Transforming the Way the World Plans



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Presented By



fa-mag.com

Featuring



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Today's Discussion

Retiring “On Purpose”



Purpose is good for you!

- **52% less likely to develop Alzheimer's**
- **Prevents strokes by as much as 44%**
- **Reduces the chances of a cardiovascular event by 19%**



The “Generativity” Impulse



Carl Jung on Retirement



Old age is a rich period of spiritual growth and individual reflection.

3 Attitudes of Experienced Adults

The “I’m done” crowd

The “I have to” crowd

The “I’m inspired” crowd




“The true joy of life”



“This is the true joy of life: the being used up for a purpose, recognized by yourself as a mighty one: being a force of nature instead of a feverish, selfish, little clot of ailments and grievances, complaining that the world will not devote itself to making you happy.”

—George Bernard Shaw

Prescription for better retirement



Vitamin C1 - Connectivity
Vitamin C2 - Challenge
Vitamin C3 - Curiosity
Vitamin C4 - Creativity
Vitamin C5 - Charity

What are the ways you use your personal "vitamin" to supplement your life now?



The Transcendent Life

JOB: Something I
have to do.



INTEREST: Something I
enjoy doing.



The Transcendent Life



MISSION: My reason for being.

My Life List

- Travel
- Relax
- Teach others
- Spend time with spouse
- Explore
- Learn new skills
- Connect with family
- Engage in a hobby
- Do projects at home
- Start a new business
- Continue present work
- Find balance
- Play
- Mentor others
- Connect with friends
- Educate myself
- Work with charities
- Help out with kids
- Take it easy
- Go back to school
- Dust off old dreams
- Do consulting work
- Increase my community involvement
- Hang out with retired friends
- Help others
- Connect with a cause
- Get a part-time hobby job
- Take on a new challenge
- Write about experiences



Purposeful Retirement

Connecting with others

Whom do I desire to build stronger connections with, and why?

Challenging Myself

How I will continue to challenge my intellect, my faculties, and my will?

Contributing to Others

Which people and causes would I like to assist?

Exploration Agenda

PLACES I would like to go

EXPERIENCES I would like to try

PEOPLE I'd like to meet



Retirement Reflections



What observations have I made and what lessons have I learned watching other people retire?

Retirement Dialogues

My Retirement Observations

My Retirement Observations

Michael Andersen Jackie Andersen

Below are attributes you have witnessed in those who have NOT retired well and those who HAVE retired well.
Check all the attributes that you have observed

Attributes of those who have NOT retired well

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

Attributes of those who HAVE retired well













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

Retirement Dialogues

Retirement Visioning

Retirement Visioning Help

Choose up to 6 images below that fit your version for retirement

 <p>Travel</p>	 <p>Play</p>	 <p>Relax</p>	 <p>Join a group/league/club</p>
 <p>Continue learning</p>	 <p>Teach/mentor</p>	 <p>Learn a new skill</p>	 <p>Develop a new hobby</p>
 <p>Home Project</p>	 <p>More time with family</p>	 <p>Keep working (full or part time)</p>	 <p>Spiritual renewal</p>

Retirement Dialogues

My Ideal Week in Retirement

Spending Your Time: the Ideal Week in Retirement Help

Think about your Ideal Week in Retirement and use this calendar to outline a schedule.

	Morning	Afternoon	Night
Sunday	<input type="text"/>	<input type="text"/>	<input type="text"/>
Monday	<input type="text"/>	<input type="text"/>	<input type="text"/>
Tuesday	<input type="text"/>	<input type="text"/>	<input type="text"/>
Wednesday	<input type="text"/>	<input type="text"/>	<input type="text"/>
Thursday	<input type="text"/>	<input type="text"/>	<input type="text"/>
Friday	<input type="text"/>	<input type="text"/>	<input type="text"/>
Saturday	<input type="text"/>	<input type="text"/>	<input type="text"/>

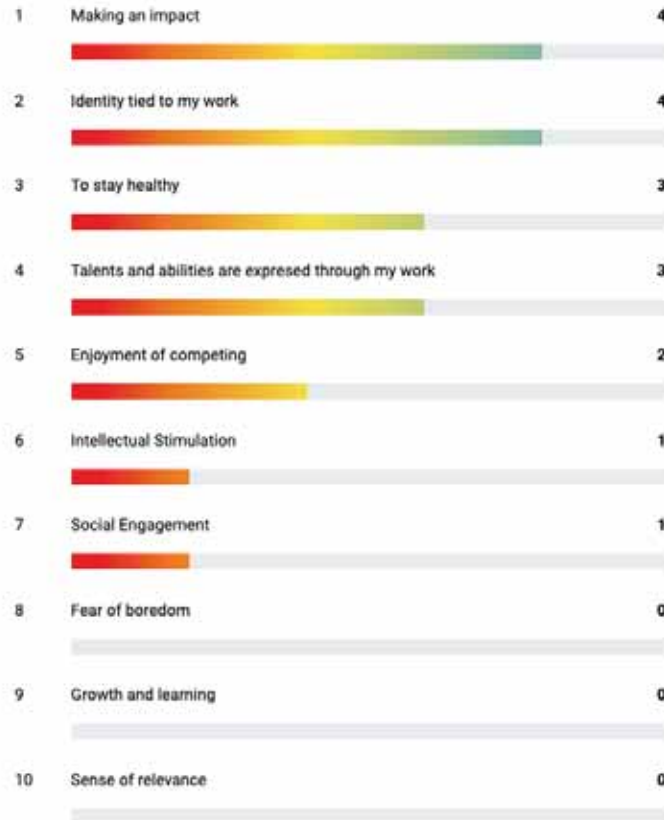
Retirement Dialogues

My Retirement Worksheet

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Lifestyle Motivators

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Economic Motivators

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Retirement Dialogues

My Retirementality Profile

My Retirementality Profile Help

Within each group, choose the phrase best describes you, with 4 being best and 1 being least.

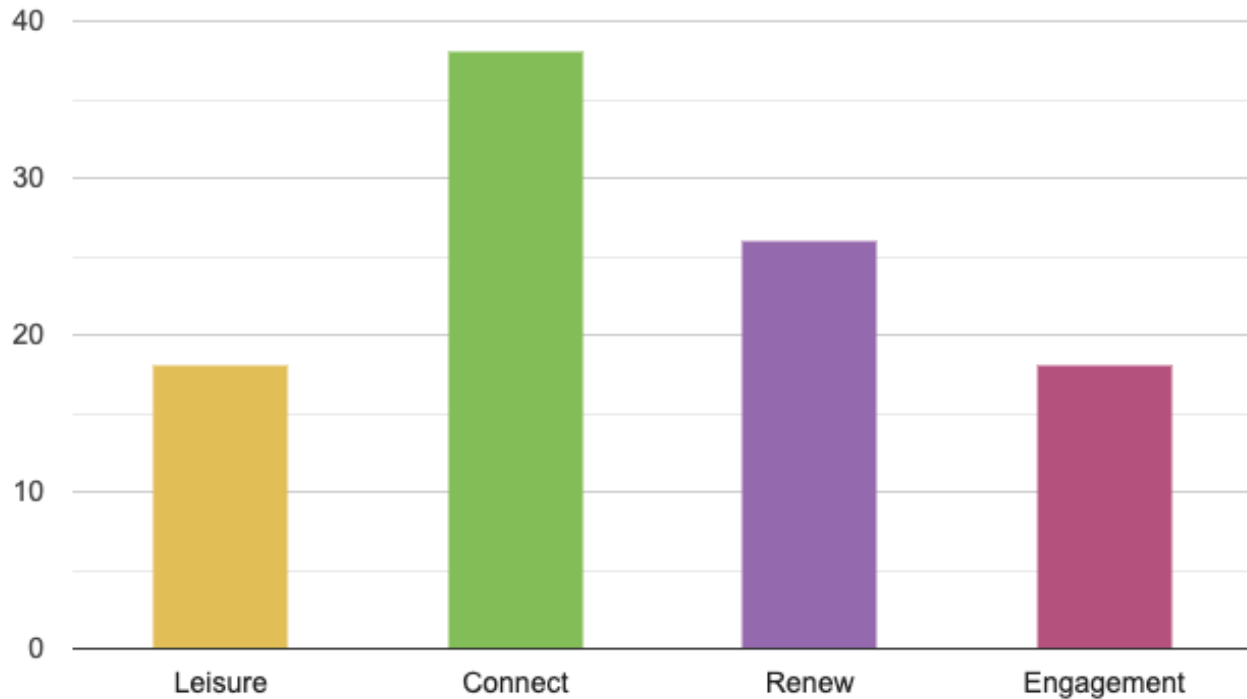
<p>A I love to kick back and relax</p> <p>B I love to spend time with family and friends</p> <p>C I love exercising</p> <p>D I love my work</p>	<p>A I want to play every day</p> <p>B I want to plan some family trips</p> <p>C I want to pay more attention to my spiritual well-being</p> <p>D I want to use my abilities to help others</p>
<p>A I want to spend more time on hobbies and other interests</p> <p>B I want make deeper connections</p> <p>C I want to expand my interests</p> <p>D I have sense of calling</p>	<p>A I want to start working on my "bucket list"</p> <p>B I want to start making memories</p> <p>C I want to get in top shape</p> <p>D I want to make a difference in the world</p>
<p>A I want to get away from work</p> <p>B I want to spend more time with my spouse</p> <p>C I want to seek balance and meaning</p> <p>D I want to continue doing what I do</p>	<p>A I want wake up to an empty agenda</p> <p>B I want to be more involved in the community</p> <p>C I want to increase my energy level</p> <p>D I want to feel challenged intellectual</p>
<p>A I want to visit a lot of place</p> <p>B I want to catch up with friends</p> <p>C I want to make health a priority</p> <p>D I want to continue finding new challenges</p>	<p>A I have many interests to take up my time</p> <p>B There are groups that I want to connect with</p> <p>C I want to lower my stress level</p> <p>D I want to continue using my skills at some level</p>
<p>A I look forward to "every day is Saturday"</p> <p>B I look forward to spending more time with the people who are important to me</p> <p>C I look forward to to more personal growth</p> <p>D I look forward to interacting with people I work with</p>	<p>A There are places I want to go</p> <p>B I want to invest in relationships</p> <p>C I want to read and learn more</p> <p>D I want highly engaged in what I do professionally</p>

Submit

Retirement Dialogues

My Retirementality Profile

Line Chart Bar Chart



Enduring Attitudes



- **Keep meaningful pursuit at the core.**
- **Challenge my mind, body, and spirit.**
- **Refuse to be defined by age.**
- **Keep an eye on my “attitude instrument.”**

Mission Accomplished!



What goals and objectives do you hope to have accomplished in retirement?

Q&A

What questions do you have?

To learn more, visit:

[Roladvisor.com/retirement](https://roladvisor.com/retirement)



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