

# On-Purpose Retirement

## How to Experience a Meaningful and Fulfilling Retirement

*...Regardless of How Much Money You Have*

By Denver J. Hudson with Michael J. Langdon

### *Home Study Course*

**- Stage 2 -**

*"When you are inspired by some great purpose, some extraordinary project, all your thoughts break their bounds: Your mind transcends limitations, your consciousness expands in every direction and you find yourself in a new, great and wonderful world. Dormant forces, faculties and talents become alive, and you discover yourself to be a greater person by far than you ever dreamed yourself to be."*

-Patanjali

## **ACTION PLAN WORKBOOK**

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## On-Purpose Retirement How to Experience a Meaningful and Fulfilling Retirement

*...Regardless of How Much Money You Have*

### ACTION PLAN WORKBOOK - Stage 2

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#### **A Word From The Authors\***

The purpose of this program is to educate, inspire, and guide. We offer this program with our gratitude for the opportunity to share this life-transforming material with you. The information should be used as a general guide and not as the ultimate source for altering your life. We offer it as a complement to your experience, wisdom and desire to live a more abundant and satisfying life.

The exercises contained within this *Action Plan Workbook* and audio program are provided to give you the opportunity to further understand, apply, and experience the principles discussed. They are not intended to serve as psychological counseling or as financial advice or to substitute for these. If you are in need of psychological counseling or financial planning, please seek the services of a qualified professional.

We are committed to providing you with some of the highest quality education, mentoring, and coaching services available. We invite your feedback and questions about this program. Please send your comments to: [denver@mynewretirement.com](mailto:denver@mynewretirement.com).

We know you will find this program both useful and life transforming.

*\*See back of workbook for bios*

# On-Purpose Retirement ACTION PLAN

## **Welcome to the *On-Purpose Retirement Home Study Course Action Plan Workbook!***

This *Action Plan Workbook* has been designed to be used in conjunction with the *On-Purpose Retirement Home Study Course Audio Program* and *Participant Handbook*. By using this workbook, you will be taking your learning to a whole new level.

To get the most from the *Action Plan Workbook*, we highly recommend that you work through the following exercises and answer the corresponding questions as you move through the audio program. This will provide a much richer and deeper learning experience and will increase your results.

We also recommend that if you are in a relationship with someone who will be impacted by the intentional changes you will be making as a result of this program, that you involve them in these exercises. (Additional workbooks are available for purchase.)

As you work with these exercises, you may find that you would like some assistance in implementation. We offer a variety of coaching packages that offer one-on-one coaching to assist you identifying, preparing for, and living your on-purpose life. To learn more about coaching, please visit [www.MyNewRetirement.com](http://www.MyNewRetirement.com).

Thank you for this opportunity to be of service!

Denver J. Hudson and Michael J. Langdon



# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 -Establishing Your Values-Based Vision

Think back and write down the times in your life when you were successful, happy, and fully alive.	What did you <i>have</i> during those times?	What were you <i>doing</i> ?	What – specifically – made you feel fully alive during those times?

Check or circle the items above that you want to include in your retirement vision.

<p>List five people that you have admired and respected during your lifetime.</p> <ol style="list-style-type: none"> <li>1.</li> <li>2.</li> <li>3.</li> <li>4.</li> <li>5.</li> </ol>	<p>What qualities or characteristics do you admire about these people?</p> <p><input type="checkbox"/> Check the qualities you would like to demonstrate in your retirement and include in your vision.</p>
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# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 -Establishing Your Values-Based Vision

When looking back on your life, what have been some things that...

... you have been <b>committed</b> to?	... have been <b>important</b> to you?	... that you have been <b>passionate</b> about?
<input type="checkbox"/> Include in vision	<input type="checkbox"/> Include in vision	<input type="checkbox"/> Include in vision

Recall a time or times in your life when you have been frustrated, angry, or upset. What were you *not* allowing yourself to express or do that caused you to feel that way?

Retirement can be a time when you can express and do things that you have not been able to do before. Of the things you wrote down above, what would you like to include in your retirement vision?

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 -Establishing Your Values-Based Vision

My "success formulas" in life have included: (e.g. "No pain - No gain" "Whatever It Takes" "Sacrifice Today - Play Later")

My "success formulas" for retirement will include:

Circle the ones to include in your vision

**What are some of the dreams you have had that you gave up on, but are still important to you?**

Would you like to include these dreams in your retirement vision?

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 -Establishing Your Values-Based Vision

**What have been your greatest contributions up to this point in your life?**

What contributions would you like to make during your retirement and that you would like to include in your vision?

**What are you most grateful for regarding your past?**

How will you express gratitude in your retirement vision?

**If you were educating younger people on what it takes to be successful, happy, and fulfilled, what would you tell them?**

How will you share your wisdom with others during retirement?

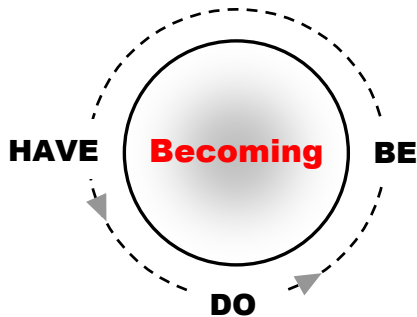
# On-Purpose Retirement ACTION PLAN

Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

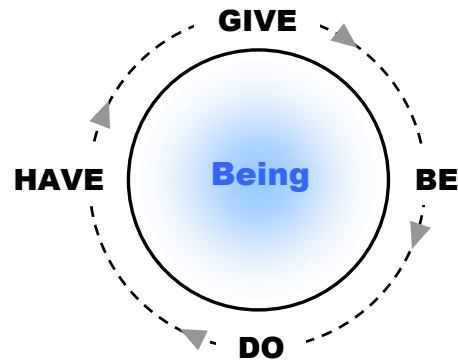
## Identifying Your Basic Approach to Life

Track 3, pages 15 -16 in the Participant Handbook

### Have-Do Approach



### Being-Yourself Approach



What are some examples from your life of the *Have-Do Approach*?

What are some examples from your life of the *Being-Yourself Approach*?

What would your retirement be like if you based it on this approach?

What would your retirement be like if you based it on this approach?

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

### A Look At Your Life Today in Eight Major Life Areas

Track 4, pages 17 – 18 in the Participant Handbook

The following exercise will assist you in identifying aspects of your life today that you may or may not want to be a part of your retirement. Review the examples in the *Participant Handbook* on page 17, then record your answers in space below.

Your Life Today...

Work/Career	What I Am <b>HAVING</b> (Result/Outcomes)	What I Am <b>DOING</b> (Actions/Expressions)	What I Am <b>BEING</b> (States of Being/Feelings)
<i>Helpful</i>			
<b>Impact on Retirement</b>	Like to <i>have</i> in retirement? <input type="checkbox"/> Include in vision	Like to <i>do</i> in retirement? <input type="checkbox"/> Include in vision	Like to <i>be</i> in retirement? <input type="checkbox"/> Include in vision
<i>Harmful</i>			
<b>Impact on Retirement</b>	What will be the impact on your retirement if you continue to <i>have</i> this? What changes can you make beginning today?	What will be the impact on your retirement if you continue to <i>do</i> this? What changes can you make beginning today?	What will be the impact on your retirement if you continue to <i>be</i> this? What changes can you make beginning today?

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

Your Life Today... (continued)

<b>Money/ Finances</b>	<b>What I Am HAVING</b> (Result/Outcomes)	<b>What I Am DOING</b> (Actions/Expressions)	<b>What I Am BEING</b> (States of Being/Feelings)
<i>Helpful</i>			
<b>Impact on Retirement</b>	Like to <i>have</i> in retirement? <input type="checkbox"/> Include in vision	Like to <i>do</i> in retirement? <input type="checkbox"/> Include in vision	Like to <i>be</i> in retirement? <input type="checkbox"/> Include in vision
<i>Harmful</i>			
<b>Impact on Retirement</b>	What will be the impact on your retirement if you continue to <i>have</i> this? What changes can you make beginning today?	What will be the impact on your retirement if you continue to <i>do</i> this? What changes can you make beginning today?	What will be the impact on your retirement if you continue to <i>be</i> this? What changes can you make beginning today?

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

Your Life Today... (continued)

Personal Development	What I Am HAVING (Result/Outcomes)	What I Am DOING (Actions/Expressions)	What I Am BEING (States of Being/Feelings)
<i>Helpful</i>			
<b>Impact on Retirement</b>	Like to <i>have</i> in retirement? <input type="checkbox"/> Include in vision	Like to <i>do</i> in retirement? <input type="checkbox"/> Include in vision	Like to <i>be</i> in retirement? <input type="checkbox"/> Include in vision
<i>Harmful</i>			
<b>Impact on Retirement</b>	What will be the impact on your retirement if you continue to <i>have</i> this? What changes can you make beginning today?	What will be the impact on your retirement if you continue to <i>do</i> this? What changes can you make beginning today?	What will be the impact on your retirement if you continue to <i>be</i> this? What changes can you make beginning today?

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

Your Life Today... (continued)

Physical Health & Well-Being	What I Am HAVING (Result/Outcomes)	What I Am DOING (Actions/Expressions)	What I Am BEING (States of Being/Feelings)
<i>Helpful</i>			
<b>Impact on Retirement</b>	Like to <i>have</i> in retirement? <input type="checkbox"/> Include in vision	Like to <i>do</i> in retirement? <input type="checkbox"/> Include in vision	Like to <i>be</i> in retirement? <input type="checkbox"/> Include in vision
<i>Harmful</i>			
<b>Impact on Retirement</b>	What will be the impact on your retirement if you continue to <i>have</i> this? What changes can you make beginning today?	What will be the impact on your retirement if you continue to <i>do</i> this? What changes can you make beginning today?	What will be the impact on your retirement if you continue to <i>be</i> this? What changes can you make beginning today?

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

Your Life Today... (continued)

Family & Spouse or Significant Other	What I Am <b>HAVING</b> (Result/Outcomes)	What I Am <b>DOING</b> (Actions/Expressions)	What I Am <b>BEING</b> (States of Being/Feelings)
<i>Helpful</i>			
<b>Impact on Retirement</b>	Like to <i>have</i> in retirement? <input type="checkbox"/> Include in vision	Like to <i>do</i> in retirement? <input type="checkbox"/> Include in vision	Like to <i>be</i> in retirement? <input type="checkbox"/> Include in vision
<i>Harmful</i>			
<b>Impact on Retirement</b>	What will be the impact on your retirement if you continue to <i>have</i> this? What changes can you make beginning today?	What will be the impact on your retirement if you continue to <i>do</i> this? What changes can you make beginning today?	What will be the impact on your retirement if you continue to <i>be</i> this? What changes can you make beginning today?

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

Your Life Today... (continued)

Friends, Social Life, Community	What I Am HAVING (Result/Outcomes)	What I Am DOING (Actions/Expressions)	What I Am BEING (States of Being/Feelings)
<i>Helpful</i>			
<b>Impact on Retirement</b>	Like to <i>have</i> in retirement? <input type="checkbox"/> Include in vision	Like to <i>do</i> in retirement? <input type="checkbox"/> Include in vision	Like to <i>be</i> in retirement? <input type="checkbox"/> Include in vision
<i>Harmful</i>			
<b>Impact on Retirement</b>	What will be the impact on your retirement if you continue to <i>have</i> this? What changes can you make beginning today?	What will be the impact on your retirement if you continue to <i>do</i> this? What changes can you make beginning today?	What will be the impact on your retirement if you continue to <i>be</i> this? What changes can you make beginning today?

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

Your Life Today... (continued)

Spiritual Development	What I Am HAVING (Result/Outcomes)	What I Am DOING (Actions/Expressions)	What I Am BEING (States of Being/Feelings)
<i>Helpful</i>			
<b>Impact on Retirement</b>	Like to <i>have</i> in retirement? <input type="checkbox"/> Include in vision	Like to <i>do</i> in retirement? <input type="checkbox"/> Include in vision	Like to <i>be</i> in retirement? <input type="checkbox"/> Include in vision
<i>Harmful</i>			
<b>Impact on Retirement</b>	What will be the impact on your retirement if you continue to <i>have</i> this? What changes can you make beginning today?	What will be the impact on your retirement if you continue to <i>do</i> this? What changes can you make beginning today?	What will be the impact on your retirement if you continue to <i>be</i> this? What changes can you make beginning today?

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

Your Life Today... (continued)

Fun & Recreation	What I Am HAVING (Result/Outcomes)	What I Am DOING (Actions/Expressions)	What I Am BEING (States of Being/Feelings)
<i>Helpful</i>			
<b>Impact on Retirement</b>	Like to <i>have</i> in retirement? <input type="checkbox"/> Include in vision	Like to <i>do</i> in retirement? <input type="checkbox"/> Include in vision	Like to <i>be</i> in retirement? <input type="checkbox"/> Include in vision
<i>Harmful</i>			
<b>Impact on Retirement</b>	What will be the impact on your retirement if you continue to <i>have</i> this? What changes can you make beginning today?	What will be the impact on your retirement if you continue to <i>do</i> this? What changes can you make beginning today?	What will be the impact on your retirement if you continue to <i>be</i> this? What changes can you make beginning today?



# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

5. What are you *being* today that you hope to be in retirement?
  
  
  
  
  
  
  
  
  
  
6. For *each* of the Eight Major Life Areas on the *Life Map*, consider the following questions:
  - What is missing in your life today in this area?
  - What would make this area of your life more fulfilling?

**Work/Career**

**Money/Finances**

**Personal Development**

**Physical Health & Well-Being**

**Family & Spouse or Significant Other**



# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

### Reawakening Your Dreams, Passions, and Vision

Track 6, pages 20 – 23 in the Participant Handbook

Answer the following questions and complete the following sentences for each of the Eight Major Life Areas. **Answer as though you are already retired.**

#### Work/Career

What must you <i>be</i> for your retirement to be fulfilling?	What must you <i>do</i> for your retirement to be fulfilling?	What must you <i>have</i> for your retirement to be fulfilling?
"My life is as good as it can get because I am <i>feeling</i> ...	"My life is as good as it can get because I am <i>doing</i> ...	"My life is as good as it can get because I <i>have</i> ...

I am experiencing what I once thought was impossible, which is...

I continue to work in the following ways...

I volunteer in the following ways...

A new, fulfilling career I am enjoying is...

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

### Work/Career

"In this area, here are some of my:

Dreams & Goals	Commitments	Passions & Missions

Contributions	Life Lessons	Success Formulas

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

Remember to answer as though you are already retired.

### Money/Finances

What must you <i>be</i> for your retirement to be fulfilling?	What must you <i>do</i> for your retirement to be fulfilling?	What must you <i>have</i> for your retirement to be fulfilling?
"My life is as good as it can get because I am <i>feeling</i> ...	"My life is as good as it can get because I am <i>doing</i> ...	"My life is as good as it can get because I <i>have</i> ...

I have enough money to purchase the following possessions...

My financial situation is...

My relationship with money is...

I give generously to the following causes...

I am earning an income of...

I enjoy financial freedom because of...

I practice good stewardship by...

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

### Money/Finances

"In this area, here are some of my:

Dreams & Goals	Commitments	Passions & Missions

Contributions	Life Lessons	Success Formulas

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

Remember to answer as though you are already retired.

### Personal Development

What must you <i>be</i> for your retirement to be fulfilling?	What must you <i>do</i> for your retirement to be fulfilling?	What must you <i>have</i> for your retirement to be fulfilling?
"My life is as good as it can get because I am <i>feeling</i> ...	"My life is as good as it can get because I am <i>doing</i> ...	"My life is as good as it can get because I <i>have</i> ...

My mental health is...

I invest in myself in the following ways...

I fully express myself in the following ways...

The characteristics and skills I am using include...

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

### Personal Development

"In this area, here are some of my:

Dreams & Goals	Commitments	Passions & Missions

Contributions	Life Lessons	Success Formulas

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

Remember to answer as though you are already retired.

### Physical Health & Well-Being

What must you <i>be</i> for your retirement to be fulfilling?	What must you <i>do</i> for your retirement to be fulfilling?	What must you <i>have</i> for your retirement to be fulfilling?
"My life is as good as it can get because I am <i>feeling</i> ...	"My life is as good as it can get because I am <i>doing</i> ...	"My life is as good as it can get because I <i>have</i> ...

When I wake up in the morning, I feel...

My physical health is...

To maintain good health, I exercise regularly in the following ways...

My living environment nourishes me in the following ways...

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

### Physical Health & Well-Being

"In this area, here are some of my:

Dreams & Goals	Commitments	Passions & Missions

Contributions	Life Lessons	Success Formulas

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

Remember to answer as though you are already retired.

### Family & Spouse or Significant Other

What must you <i>be</i> for your retirement to be fulfilling?	What must you <i>do</i> for your retirement to be fulfilling?	What must you <i>have</i> for your retirement to be fulfilling?
“My life is as good as it can get because I am <i>feeling</i> ...	“My life is as good as it can get because I am <i>doing</i> ...	“My life is as good as it can get because I <i>have</i> ...

I am involved in my family in the following ways...

I contribute to my family by...

My relationship with my spouse is...

I am helping my family fulfill their goals and dreams by...

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

### Family & Spouse/Significant Other

"In this area, here are some of my:

Dreams & Goals	Commitments	Passions & Missions

Contributions	Life Lessons	Success Formulas

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

Remember to answer as though you are already retired.

### Spiritual Development

What must you <i>be</i> for your retirement to be fulfilling?	What must you <i>do</i> for your retirement to be fulfilling?	What must you <i>have</i> for your retirement to be fulfilling?
"My life is as good as it can get because I am <i>feeling</i> ..."	"My life is as good as it can get because I am <i>doing</i> ..."	"My life is as good as it can get because I <i>have</i> ..."

My spiritual life is...

I am involved in my spiritual community in the following ways...

I make each day meaningful and purposeful by...

My daily spiritual practices includes...

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

### Spiritual Development

"In this area, here are some of my:

Dreams & Goals	Commitments	Passions & Missions

Contributions	Life Lessons	Success Formulas

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

Remember to answer as though you are already retired.

### Fun & Recreation

What must you <i>be</i> for your retirement to be fulfilling?	What must you <i>do</i> for your retirement to be fulfilling?	What must you <i>have</i> for your retirement to be fulfilling?
"My life is as good as it can get because I am <i>feeling</i> ..."	"My life is as good as it can get because I am <i>doing</i> ..."	"My life is as good as it can get because I <i>have</i> ..."

I enjoy the following recreational activities...

My physical activities include...

The hobbies and interest I pursue are...

I am traveling to see...

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

### Fun & Recreation

"In this area, here are some of my:

Dreams & Goals	Commitments	Passions & Missions

Contributions	Life Lessons	Success Formulas

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

### Additional Components of Your Vision

Complete the following sentences *from the position of your future retirement*. Then decide which components will be included in your retirement vision.

- Each day ends with an overall feeling of...
  
- My general approach to life is...
  
- I have made the following commitments to myself...
  
- The things that most inspire me are...
  
- I am pursuing the following passions...
  
- I have no regrets because...
  
- I experience meaning and fulfillment each day because...
  
- The legacy I am leaving through my retirement is...

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

### Identifying Your Personal Values

Track 7

Now that you have completed the above exercises, let's go back and look at your answers with the purpose of identifying your personal values and the things that are most important to you. The rule with values is:

**values expressed = fulfillment**  
**values not expressed = frustration**

Looking back at the *Circle of Life* on page 15 in the *Participant Handbook*, you will recall that the Circle is comprised of four aspects: BE, DO, HAVE, and GIVE. During this segment of the program, we are going to be identifying your Personal Values (BE) and the things that are most important for you to DO, HAVE, and GIVE. These will serve as the core of your retirement vision. When you are expressing your personal values and the things that are most important to you are present in your life, you experience a life filled with greater meaning and fulfillment.

As you are guided back through your answers (via the audio program), record your answers in the appropriate column below or on a separate sheet of paper.

Personal Values BE	Most Important to DO	Most Important to HAVE	Most Important to GIVE

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

### **Putting It All Together – Guidelines for Writing Your Vision Statement**

#### *Track 8*

We've come a long way. Through a series of exercises, you have become more aware of the things that are important to you and that you would like to include in your retirement vision. It is now time to pull all of this information together to craft a values-based vision of your retirement!

Before we do that, however, let me provide some clarity around the issue of *vision*. We are *not* encouraging the formulation of the vision in order to get attached and stressed about the future. Your retirement vision will benefit you as much today as it will in the years ahead. As you have already discovered, the process of formulating a vision is very much about understanding more of who you are and how you would like to show up in the world. That is the true significance of creating a vision. In addition, you can utilize your vision to help you make wiser choices today in each area of life; each choice that you are making today is creating your experience of tomorrow.

As we guide you in the process of creating your Values-Based Life Plan vision, please keep in mind that you will not be asked to wait to live that vision sometime in the far off future. In fact, Stage 3 is about helping you to live your vision of the future starting right now in this moment! Let's now take a look at some guidelines to keep in mind as you write your vision.

#### *Guidelines for Crafting Your Retirement Vision*

1. Your vision is to be truly yours, coming from the core of your being, and not based on what others think or on social conditioning. In other words, write what you truly feel, regardless of what others might think about it. Focus on what you *want*, not what you *don't want*.
2. Your vision includes an expression of your unique gifts, talents, and skills and how you will utilize them in making a contribution.
3. Your vision includes how you will expand beyond yourself and reach out to others through a higher purpose.
4. Your vision includes the physical, mental, emotional, and spiritual aspects of your life. It includes the levels of *be, do, have, and give*.
5. Your vision is values based and includes your intentions.
6. Your vision includes all major life areas (see the *Life Map*)

# On-Purpose Retirement ACTION PLAN

## Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

### *Guidelines for Crafting Your Retirement Vision (continued)*

7. Your vision is infused with passion, belief, and affirmation. It inspires you to move to higher and higher levels of experience. It is truly compelling and evokes strong emotions.
8. Your vision stretches you beyond your current comfort zone. It may even feel impossible to achieve alone, requiring the assistance of others.
9. Your vision is written in the present tense and is written as if you are within the vision (vs. observing it).
10. Your vision is read often and is modified as necessary.

Utilizing these guidelines will help you to craft a complete, compelling, balanced, and authentic vision for your life!

The challenge of writing a vision may seem overwhelming, which is why we encourage you to approach the experience with a sense of adventure, curiosity, and wonder. Many find it helpful to not see it as a “task to complete,” but as a “life to create.” Consider yourself an artist, sitting before a canvas, ready to paint a fabulous picture of your life.

After having completed the exercises in this Stage of the process, you should already have a great deal of material for your vision. It is now a matter of putting it down on paper in a compelling, written statement. To assist you in doing that, consider the following idea:

Take each of the life areas of the *Life Map* and write a vision statement for each area. This will provide you with eight vision statements that together comprise your retirement vision. As you reflect on each life area, return to the corresponding life-area page in this Workbook where you completed a number of exercises, and use the various answers you recorded to assist you in writing the vision for that life area. Once you have completed an initial draft for that life area, review the above 10 guidelines for creating your retirement vision and see if the various guidelines have been met. Then, move on to the next life area. Remember, you can always revisit and revise your vision anytime you want to, so relax and enjoy the process.

# On-Purpose Retirement ACTION PLAN

Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

## **My Retirement Vision for Work/Career**

Top values to express in this life area are:

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# On-Purpose Retirement ACTION PLAN

Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

## **My Retirement Vision for Money/Finances**

Top values to express in this life area are:

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# On-Purpose Retirement ACTION PLAN

Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

## **My Retirement Vision for Personal Development**

Top values to express in this life area are:

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# On-Purpose Retirement ACTION PLAN

Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

## **My Retirement Vision for Physical Health & Well-Being**

Top values to express in this life area are:

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# On-Purpose Retirement ACTION PLAN

Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

## **My Retirement Vision for Family & Spouse/Significant Other**

Top values to express in this life area are:

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# On-Purpose Retirement ACTION PLAN

Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

## **My Retirement Vision for Friends, Social Life, Community**

Top values to express in this life area are:

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# On-Purpose Retirement ACTION PLAN

Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

## **My Retirement Vision for **Spiritual Development****

Top values to express in this life area are:

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# On-Purpose Retirement ACTION PLAN

Disc 2 - STAGE 2 - Establishing Your Values-Based Vision

## **My Retirement Vision for Fun & Recreation**

Top values to express in this life area are:

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# On-Purpose Retirement ACTION PLAN

## About the Authors



Founder and  
President of  
INTERMAX

Certified  
Training  
Consultant and  
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Denver J. Hudson

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Denver Hudson, President and Founder of INTERMAX, has been in the Personal Growth and Development Field for over 10 years.

As a Certified Training Consultant and Life Success Coach, Denver has dedicated his life to working with individuals who are passionate and committed to discovering and living their potential through the expanding of their perceptions, level of influence, authenticity, and quality of life.

Having gone through a number of challenging life transitions in 36 years, Denver woke up to the fact that a large number of people are not experiencing the necessary and desired levels of personal freedom to pursue and fulfill their dreams. Through his ongoing personal evolution, Denver finds himself called to a vocation that allows him to work with individuals and organizations who are ready to explore the power and transforming effect of personal freedom and its expression.

Through collaborative partnering with his clients, Denver creates a challenging, forward-moving atmosphere where clients are inspired to take charge of all areas of their lives allowing for the achievement of integrity, wholeness, and balance that optimizes one's life and business experience.



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Michael J. Langdon

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Since 1964, Mike Langdon has pursued his professional career in the Financial Services Industry. Recently, his role as a trusted advisor has been expanded to include life coaching, particularly for those clients preparing for or currently in retirement. Mike is on a mission to help people expand the way they make financial decisions by first identifying their sense of values and then determining their vision for the expression of those values. Achieving financial and life goals then can result in not only financial freedom, but - more importantly - in a fulfilling, meaningful and on-purpose life.

Putting his client's needs first is reflected in the testimonies of many long-term clients whose confidence and trust have been earned through Mike's commitment of integrity and emphasis on strong personal relationships.