

# Which Best Describes You?

## Beyond Retirement

*Redefining – Redirecting – Reinventing*

- Traditional Financial Planning + Values-Based Life Expression + Passionate Commitment to Personal Growth and Evolution
- Authenticity Focused
- Concerned with Legacy & making a contribution to the world
- Inner and outer focused; more global in view
- An *intentional creation* of the conditions and capacities necessary to grow and evolve to benefit of self, other, and world
- An ever-expanding opportunity
- Passion and the pursuit of Authenticity inspires life

### Key Questions:

How can I create the conditions and capacities that will continue my development/evolution?

What will be my legacy?

How can I best live my Authenticity?

*Corresponds to*

**Our Personal 1-on-1 Coaching Services**

## The New Retirement

*Life Balance and Value Alignment*

- Traditional Financial Planning + Values-Based Life Planning
- Integrity Focused
- Concerned with meaning and life purpose
- Inner and Outer focused – quality of life
- A *realization* that a major stage of one's life needs to change
- Not specific to age or occupation, but to turning points in one's life
- A new beginning
- Values and Purpose guides life

### Key Questions:

What are my values?

What is my purpose in life?

How can I best express my values and live my purpose?

When and why do I choose to retire?

*Corresponds to*

**STAGE 2 of the On-Purpose Retirement Course**

## The Old Retirement

*Rest – Leisure – Reward*

- Traditional Financial Planning
- Lifestyle focused
- Concerned primarily with rest and leisure
- Outer focused
- Brought on by age or situation of work environment
- Specific to age, occupation, and money accumulated
- A relief
- External variables direct life

### Key Questions:

How much is enough?

Will I have enough?

What type of lifestyle do I want in retirement?

When will I have to retire?

*Corresponds to*

**STAGE 1 of the On-Purpose Retirement Course**