

Retirement Prep

*Take 15–30 minutes to reflect.
Jot down brief thoughts. No need for long answers.*

Who am I beyond work? What parts of my identity will be hardest to let go of?

IDENTITY

What gives me a sense of meaning today? What do I want to feel useful or engaged in going forward?

PURPOSE

What does an ideal day in retirement look like? Do I want more structure or more flexibility?

DAILY LIFE

Retirement Prep

This is a simple worksheet to declutter your mind and find focus.

What worries me most about retirement? What might I miss the most?

CONCERNS

How do I want to feel physically and mentally in this next phase? What habits do I need to start or change?

ENERGY

How do I want to contribute or give back? What impact do I want to have?

LEGACY

How will my relationships change when I stop working? Where will my social connection come from?

RELATIONSHIPS

Retirement Readiness

Write the first thing that comes to mind and move quickly. Don't second guess your answer.

Do I want a clean break or a gradual transition? What would be hardest to let go of?

TRANSITION

How ready do I feel emotionally (1-10)? What would help me feel more prepared?

READINESS

Three years into retirement, what does a good life look like for me?

REFLECTION