

# R U N E Y

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## Retire with Purpose Worksheet

Use what you like and is applicable for you from the outline below:

### **If you are in your pre-retirement years (50+):**

1. Define who you are today:

- a. What are your goals and aspirations,
- b. What do you like to do,
- c. What is meaningful to you,
- d. Use the answers to these questions to understand who you are today.

2. Define who you want to be in retirement and what you want to do:

- a. You may define yourself differently in retirement from your working years and that is OK, perhaps even desired. Your definition will allow you to change interests, to try something you have never tried before and to really discover your best you.
- b. Use your definition of who you are today as your starting point, then answer the same questions again, but with your outlook on who you want to be in retirement:
  - i. What are your goals and aspirations,
  - ii. What do you like to do,
  - iii. What is meaningful to you,
  - iv. Use the answers to these questions to understand who you want to be when you retire.

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3. Lay out a strategy for what you want retirement to look like
4. Start to plan for your retirement activities / write them down
5. Once you have found your new (or already existing) passion, start forming a weekly or monthly habit of participating in those activities. Remember:
  - a. **Stay Active Stay Healthy**
  - b. **Social Involvement**
  - c. **Mental Stimulation**
  - d. **Spiritual Fulfillment**
  - e. **Create and Maintain an Activity Schedule**
6. [Check out our blog post, Retire on Purpose, for ideas.](#)

7. Start to engage in your planned activities to spark your interest and pivot if necessary

## **I have already retired – now what?**

8. Are you happy with your daily life – take an inventory:

- a. If yes, evaluate to make sure you want to continue with the same activities and / or add or change something to get even more out of life
- b. If no, then complete the steps outlined in the pre-retirement years above. It is never too late to change or learn something new!