



PRACTICE RETIREMENT[®]

Training Manual

The transition period is not just a time to let your nest egg grow. It's an opportunity to start enjoying the retirement lifestyle that will be most fulfilling to you and try it on for size. Use these exercises to help explore how you want to spend your transition years—to either prepare for full retirement or to simply enjoy your vibrant years even more.



PlayBook

What...

...am I doing now that I want to continue doing in retirement?
...new things do I want to do? (Rank in order of importance.)

Who...

...would I like to see more of?
How often? (Rank in order of importance.)

Where...

...would I like to continue visiting?
...are some places I'd like to explore? (Rank in order of importance.)

Play Considerations:

- What do I enjoy the most?
- What is the most different from what I'm currently doing?
- What requires the most preparation?
- What is the riskiest? (i.e., biggest commitment, most expensive, least reversible, etc.)

What do I want to try out now before I fully retire?

WorkSheet

What is the current role of work in my life?

How do I feel about the following various aspects of my work?

	Ideal	OK	Change		Ideal	OK	Change
The Industry				Flexibility			
The Hours				Stress Level			
My Role				Environment/People			
The Commute				Company Culture			
Management				Pay			
Expectations				Benefits			

What intangibles do I find most rewarding about my work?

- Collaboration
- Social Connection/Networking
- Creativity
- Sense of Accomplishment
- Intellectual Challenge
- Problem Solving
- Helping Others/Mentoring
- Competition
- Leading

What is my ideal work situation?

Which intangibles could I pursue outside of work?

What can I do now to move toward my ideal work state?

BalanceSheet

During my transition years...

What am I hoping to achieve?

What am I hoping to explore?

What am I hoping to learn?

Milestones:

Steps I need to take to help me meet my goals:

Step 1 _____ By When: _____

Step 2 _____ By When: _____

Step 3 _____ By When: _____

Training Schedule:

It may be helpful to actually schedule out your retirement test run. It could be daily or weekly. Here's a calendar to get you started:

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Key
							W = Work
							H = Hobbies
							F = Family/Friends
							T = Travel/Explore